



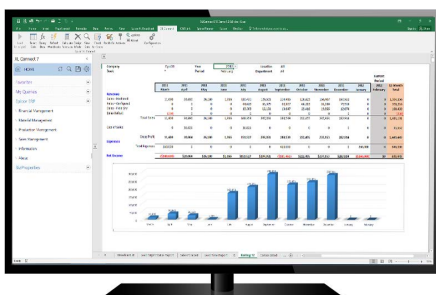
No New Enhancements for Epicor Advanced Financial Reporting (AFR)

- ▶ As of June 2020, Epicor® is no longer delivering enhancements for Epicor Advanced Financial Reporting (AFR), but bug fixes are still available for existing customers on maintenance, and the product is still in the Active Support stage
- ▶ AFR is expected to move to Sustaining Support by 2021
- ▶ It is still possible to purchase additional AFR users for existing on-premises and cloud deployments

Migration Path

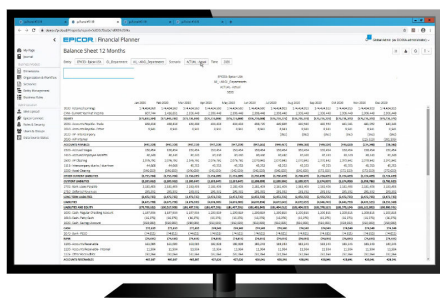


Epicor XL Connect



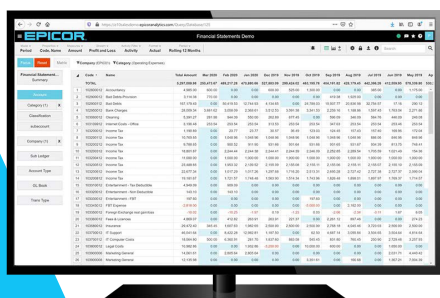
- ▶ If your organization is looking for an alternative product that gives more value and benefit to your business, three great financial reporting products are recommended that are fully integrated with Epicor ERP
- ▶ Customers on active AFR maintenance as of June 1, 2020 and later are eligible to get access to a very beneficial migration offer to migrate from AFR either to **Epicor XL Connect** or to **Epicor Financial Planner (EFP)** based on their choice - this migration offer has no time limit
- ▶ **Epicor Data Analytics (EDA)** is also a great option at your discretion, however for this product, the new non-time-limited migration offer does not apply
- ▶ Epicor XL Connect is a very popular product that is a Microsoft® Excel® add-in, allowing self-service reporting for every business user
- ▶ Share data offline with PackNGo or schedule report delivery with Broadcast
- ▶ 45 built-in report templates are available for Financials such as Balance Sheet, Income Statement, Trial Balance, Cash Flow, Aged payables, as well as for non-financial areas like Material, Production and Sales Management
- ▶ Drill down to operational data from any report
- ▶ Well-known Excel formatting, charting, functions are supported ensuring an easy learning curve
- ▶ Leverage your own BAQs in Epicor ERP with the REST API integration
- ▶ The migration plan offers to migrate:
 - AFR Designer users to Epicor XL Connect Live users
 - AFR Viewer users to Epicor XL Connect Remote users
 - Purchase as many users as your business needs

Epicor Financial Planner (EFP)



- ▶ Epicor Financial Planner (EFP) is a fully cloud based product with a web-based view and an Excel add-in
- ▶ A mature solution for Financial Planning and Analysis (FP&A) allowing reporting to C-level business leaders
- ▶ All data such as model calculations, what-if scenarios, revenue forecasts, budgets, reports and more are saved in the cloud
- ▶ Multi-level, workflow-based financial budget approval process
- ▶ Identify trends, drill-down to details from any report
- ▶ Optional content packs are available for advanced financials, consolidation, sales, and profitability
- ▶ The migration plan offers:
 - Access to a new SaaS package launched in July 2020 called **Financial Reports by EFP**
 - Light version without budget planning
 - Purchase as many users as your business needs

Epicor Data Analytics (EDA)



- ▶ Epicor Data Analytics (EDA) is a cloud-based data visualization product supporting your Business Intelligence (BI) and Analytics
- ▶ Integrated to Epicor ERP with a web-based, browser-agnostic interface
- ▶ View dashboards and drill down into data on multiple mobile devices
- ▶ Export your reports to Excel easily
- ▶ **EDA Financial Statements**, a new module launched in June 2020:
 - Create, customize, and generate your financial reports in the cloud
 - Profit and Loss, Cash Flow, Balance Sheet and Trial Balance included out-of-the-box

Next Steps:

- ▶ **Contact Encompass today!**
- ▶ **Ask for more information on these products, register for a tailor-made product demo and acquire a free trial license from to determine which product suits best your business needs!**

About Encompass

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

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