

Epicor ERP 10.2.600 Release Guide

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

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Executive Overview

"IN AN UNCERTAIN
WORLD WHERE
BUSINESSES WILL
STRUGGLE AND THEN
START GROWING AGAIN,
REMOVING THE PAIN
AND COST OF TOO MANY
INEFFICIENT PROCESSES,
THE LOW VISIBILITY INTO
THE ORGANIZATION'S
OPERATIONS, AND THE
LONG PROCESS TIMES
WILL ONLY ENHANCE THE
ORGANIZATION'S VALUE
AND CONTRIBUTE TO
PROFITABILITY.

IDC Pandemics Increase
the Need for Digital
Enterprise, March
2020



When the Epicor team set out to build this dynamic release, we didn't imagine the current business climate or its impact on our customer businesses. We continue to hear testaments to the agile nature of Epicor ERP and learn how business leaders are invoking its power in support of their business imperatives. This release of Epicor ERP 10.2.600 expands on this agility with technology and workflow designed to enable businesses to do more with less, improve existing worker productivity and expand collaboration across business users and systems.

The latest release of Epicor ERP, 10.2.600, continues our investment in ERP experience and user productivity by expanding offerings in the Kinetic Design System and introducing Epicor Application Studio, designed to simplify user customizations and personalizations in the Kinetic framework. Expansion in cloud and analytics as well as global and industry round out the capabilities of the release.

Upgrading to the latest release of Epicor ERP 10.2.600 delivers the technology needed to compete and thrive in the

current business climate. Please know that you do not have to get to this exciting release, Epicor ERP 10.2.600, without help. The Epicor Services and Support organization is ready to assist your upgrade. Start the process by contacting your customer account manager. We look forward to hearing from you.



Availability Matrix

This briefing may contain features that are not released yet. Be advised that the delivery date for general availability for some features may change and projected functionality may not be included in the release. ERP deployment availability refers to whether the solution will be available for Epicor ERP users in the cloud or on premises. This is regardless of how the solution itself is deployed. Planned availability refers to the projected plan and is subject to change. See the Forward-Looking Statements section in the disclaimer. Each feature in the table below shows the projected date of planned availability.

Feature	ERP deployment availability	Planned availability	Generally available
Kinetic Applications	Cloud, On premises	May 21, 2020	
Kinetic Personalization	Cloud, On premises	May 21, 2020	
Epicor Application Studio	Cloud, On premises	May 21, 2020	
Help and Support Panel	Cloud, On premises	May 21, 2020	
Kinetic Preview Program	Cloud, On premises	May 21, 2020	
Epicor Collaborate	Cloud, On premises	May 21, 2020	
Epicor Collaborate Microsoft Teams (available in preview until GA)	Cloud, On premises	May 21, 2020	
Epicor Data Discovery (EDD) Enhancements	Cloud, On Premises	May 21, 2020	
Epicor Data Analytics (EDA) Enhancements	Cloud, On Premises	May 21, 2020	
Epicor Virtual Agent (EVA) Enhancements	Cloud, On premises	May 21, 2020	
Epicor DocStar® ECM 2020.1	Cloud, On premises	May 21, 2020	
Multi-region Multi-company Cloud Transactions	Cloud, On premises	May 21, 2020	
Enterprise Search – Advanced Index for Public Cloud	Cloud, On premises	May 21, 2020	
Epicor Commerce Connect (ECC) Express	Cloud, On premises	April 6, 2020	April 6, 2020
1 EDI Source	Cloud, On premises	May 21, 2020	
Epicor Quick Ship 5.3.0	Cloud, On premises	May 29, 2020	
PCID (License Plate) Transfers	Cloud, On premises	May 21, 2020	
Epicor Quality Management System (QMS)	Cloud, On premises	June 4, 2020	
Advanced MES 8.3.1	Cloud, On premises	May 21, 2020	
Epicor Advanced Project Management	Cloud, On premises	May 21, 2020	
Epicor Time and Expense Management Mobile Enhancements	Cloud, On premises	May 21, 2020	
AR Centralized Collections	Cloud, On premises	May 21, 2020	
AR/AP Netting Settlement	Cloud, On premises	May 21, 2020	
AR/AP Invoices – Withholding Timing Option Through Interim Accounts	Cloud, On premises	May 21, 2020	
AP Invoice Cancellation	Cloud, On premises	May 21, 2020	
Financial Transactions – Enhanced Descriptions	Cloud, On premises	May 21, 2020	
EDA Financial Statements	Cloud, On premises	May 4, 2020	May 4, 2020
Cash Collect 4.2	Cloud, On premises	May 21, 2020	
Epicor Payroll Processing Notifications and Flexibility	Cloud, On premises	May 21, 2020	
Epicor Electronic Reports	Cloud, On premises	May 21, 2020	
Epicor Functions Enhancements	Cloud, On premises	May 21, 2020	
AR/AP Invoices - Withholding Tax Timing Option Through Interim Accounts	Cloud, On premises	June 17, 2020	
Cloud Storage for Documents	Cloud, On premises	May 21, 2020	
Improvements to Existing CSFs:	Cloud, On premises	May 21, 2020	

General

New Kinetic Applications

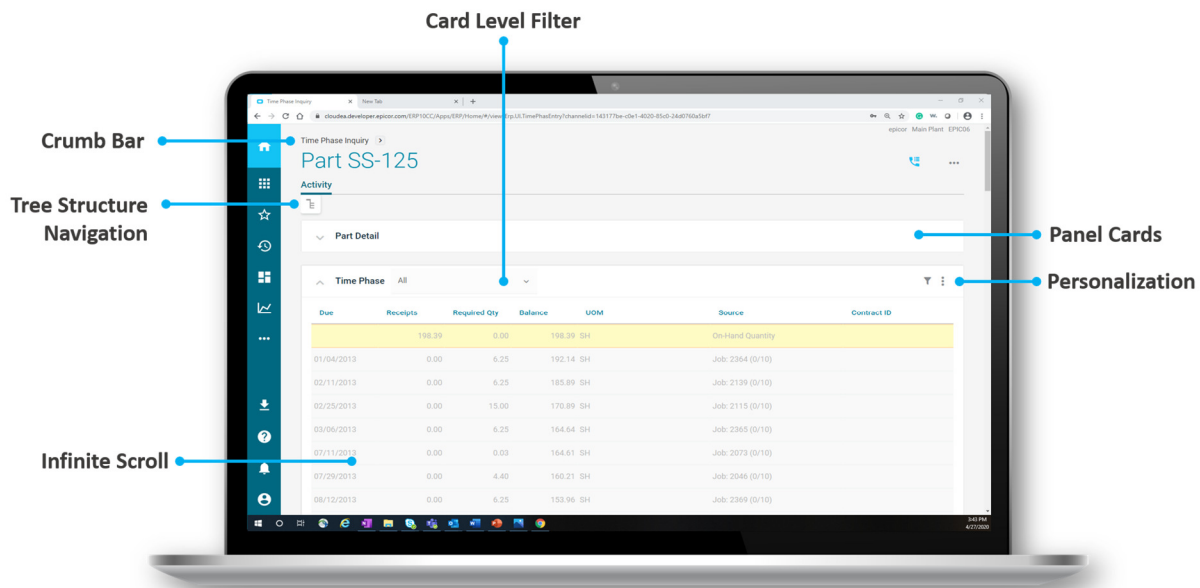
For companies globally, having a digital transformation strategy in place has become more relevant than ever. The workplace keeps changing at a fast pace, with users putting more emphasis on user experience and expecting that the software they use at work is just as good as the one they use at home. Epicor Kinetic is our answer to providing a completely redesigned user interface that empowers your workforce. We are delivering a modern, intuitive and consistent user experience across platforms and devices.

Ensuring a Successful Transition

Change doesn't happen overnight, that's why we are delivering Epicor Kinetic with a phased approach. We guide you through every step of the process enabling a smooth transition and successful adoption. 10.2.600 brings many new Kinetic applications and introduces the first step towards a new way of customization with Epicor Application Studio. This is a great opportunity to start utilizing the Kinetic UI through your organization, taking advantage of the new embedded contextual education tools to train users with a learn-as-you-go approach.

A Powerful User Interface: Modern, Intuitive and Easy to Use

The Kinetic UI has new elements that enable fast access to information, requiring less clicks and with a clean layout. We are introducing the concept of a landing page that displays the most important fields, which you can also personalize depending on your needs. New Panel Cards let you drill into additional information that is automatically retrieved when expanded. The Crumb Bar and Tree Structure Navigation facilitate the access between pages and items on the work list from the landing page. Infinite Scroll allows you to look for items in the same window without having to open additional screens.



With 10.2.600 we are delivering new Kinetic applications and functionality that simplify your daily work and make you more productive:

- ▶ Additional Kinetic Reports and Processes continuously being released during updates, which provide a clean and streamlined interface.
- ▶ Kinetic Trackers that will be accessible from the Trackers-Kinetic menu. You can access them even if you have customizations and control the rollout to users through the new Kinetic Application Maintenance.
- ▶ Kinetic Application Maintenance allows you to easily manage mass rollout of Kinetic Forms to other users using the menu hierarchy by company, functional area, module and at the form level.
- ▶ Display a BAQ Report (either SSRS or Crystal) as a Kinetic application with the new actions command, Preview Kinetic Form, on the BAQ Report Designer.
- ▶ Deploy Dashboards to the Kinetic user interface.
- ▶ Adjust a Kinetic application interface to display the content depending on your needs, to get a personal experience and maximize performance. Easily access the Kinetic Personalization panel from the overflow menu of any Kinetic application.
- ▶ Embedded Enterprise Search on the Kinetic Home Page. Find all the locations within your Epicor database that reference a specific search item, and then display this item within the application program you need.

Epicor Application Studio

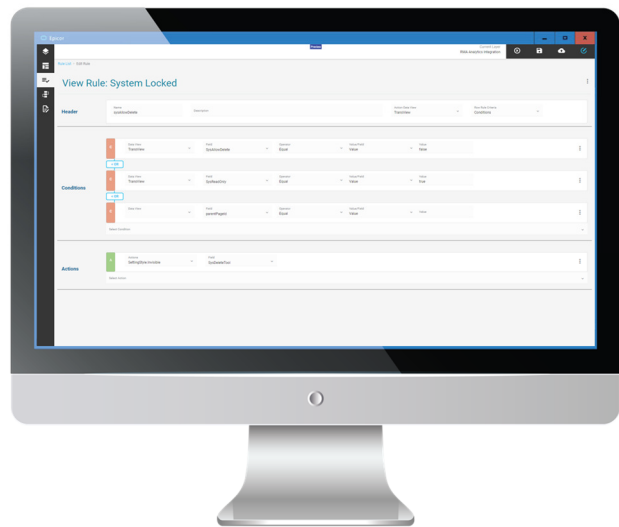
Create your own experience

Our solutions are well known for the flexibility they provide to modify the system to meet unique business needs. We are taking that expertise to the next level, so you can create your own experience on a simple, streamlined, and consistent way.

With the introduction of Epicor Application Studio, we aim to provide a similar level of flexibility you have today with ERP, but through a streamlined process that will allow you to easily and consistently tailor the system to fit your business needs. In this initial phase of the application, this powerful toolset will enable you to customize Kinetic applications that are upgrade resilient and require no code. Users with heavy customizations and code-level changes that aren't accommodated by the ability to leverage Epicor Functions (introduced in 10.2.500), will want to review the new capabilities in the Epicor Application Studio as the team continues developing tools to reduce the need for external code. More to come around capabilities and flexibility in future releases.

Epicor Application Studio follows the Kinetic phased release approach to enable a smooth transition and successful user adoption. With 10.2.600 we are delivering an initial set of features that will continue to evolve and grow over the next upgrades and product releases:

- ▶ Layout Customization: Application Studio introduces layout templates that help developers design esthetically pleasing customizations that will offer responsive design when used with different sized devices. In this solution you can easily adjust the layout of a Kinetic application page. Add and define different controls like text boxes, fields, columns, checkboxes, among others. Also build new pages and navigations within the application as you need.



- ▶ Row Rules Logic: Manage existing or create new rules through conditional logic in a Kinetic application.
- ▶ Events Designer: Create an event similar to a BPM that activates from a specific action or condition and execute via a control (button, text box, checkbox, etc.).
- ▶ Customization Hierarchy: Offers easily stackable customizations to offer limitless flexibility in building and deploying your customizations, for your business, location, etc.

We have also included a set of customization best practices so you can start getting familiar with this new method. You can build and test customizations while learning through the embedded Guided Learning and easily provide your feedback within the application. To start working in Epicor Application Studio, you simply need to launch the Kinetic application you want to customize in the developer mode.

Are my existing customizations going away? No, they are not going anywhere. We will continue supporting your existing embedded customizations and the toolkit functionality. In fact, by default the Classic version of your form or application will launch with your current customization. There are options available at both the admin and user level to display either the Kinetic or the Classic version of a form or application. If you have additional questions please refer to the [Epicor ERP Kinetic Customer FAQ](#)

Epicor Application studio will be introduced with 10.2.600.2 and will continue to have updates in the following product upgrades and releases. Epicor Application Studio has a detailed help system and articles inside the application to ease training and user adoption.

Help and Support Panel

The Help and Support Panel, embedded on the Kinetic Home Page, provides single search access to online help articles, videos, and the new Guided Learning feature. Eliminate the need to manage multiple platforms, as you can access the Epicor Learning Center, Embedded Education, EpicCare and EpicWeb from a single point.

Quickly access personalized, relevant and contextual information based on who you are and where you are in the product. You can also enable Kinetic Field Help from the Help and Support Panel. When you have a question about a Kinetic application you can easily find the answer without leaving the system. Simply click question marks next to fields to open a Field Help panel on the right that displays technical details. This is a great tool to get familiar and ease user adoption of Kinetic elements.

The new Guided Learning is based on the concept of learn-as-you-go, taking you through a complete process in real-time life in the system. It provides product, form and feature tours, as well as in-app communications. Experience a seamless and intuitive onboarding and training process. This is also a great tool for users to learn and get familiar with Kinetic forms as they perform their jobs.

Kinetic Preview Program

Epicor Kinetic is not how we imagined our software should look and perform, it's how you need it. Customers are at the core of this user experience transformation as your feedback helps shape our solutions and drive smart innovation. We continue running the Kinetic Preview Program as the main initiative to provide you with early access to new Kinetic applications and gather your input.

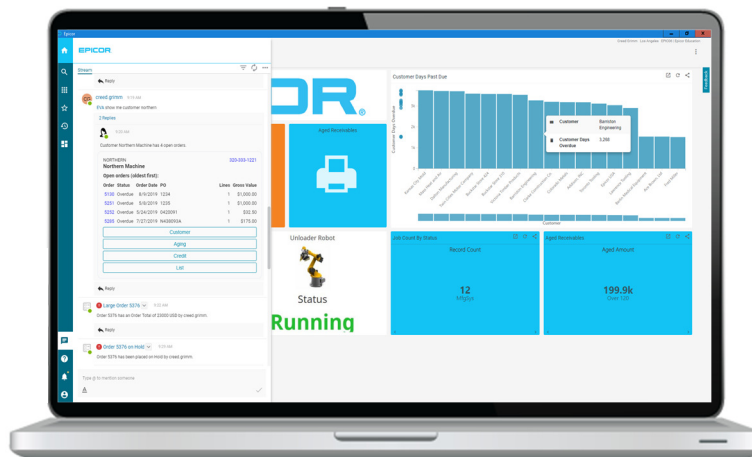
You will have the opportunity to test drive new Kinetic forms like a preview of the redesigned Sales Order Entry screen before they are generally available to all customers. If you would like to experience the benefits of our new user interface and get familiar with it, you can request access from your Customer Account Manager. For more information about the program, see the [Epicor ERP Kinetic Customer FAQ](#) on EpicWeb.

Epicor Collaborate

In 10.2.500 Epicor introduced Epicor Collaborate, a modern workplace productivity tool built on a cloud platform. In the latest release of Epicor ERP, this solution expands to offer a rich toolset that serves the business not only in terms of connecting employees for greater responsiveness, but it also expands to offer a platform that drives new levels of operational productivity for users.

Rich Feature Set for Collaborative Messaging

In the latest release, Epicor Collaborate delivers features that offer greater parity to Epicor Social Enterprise in terms of messaging. Easy to use and intuitive with @mentions and now #hashtags, you can also edit, flag, and share messages. Making it easier for staff and departments to share information means that skills and knowledge can be pooled - leading to thorough problem solving, better project progression, and new ideas.



Group Messaging

Employees exceedingly work in groups to drive innovation and meet customer expectations. In particular, being able to support cross-functional teams that can coalesce around a complex estimate, project, customer issue, production event whether single instance or ongoing and more. Introducing this group functionality (both public and private) is important as members are informed on a timely basis and can offer their perspective.

Microsoft Teams Integration

Microsoft Teams is an industry-leading collaboration platform that combines persistent workplace chat, video meetings, file storage, and application integration for businesses. It is widely used and sits alongside Microsoft Office 365 productivity tools. Epicor Collaborate Groups connected to Microsoft Teams can share communications across users, including external guests outside of Epicor ERP. *Note: as of the publication of this guide, this feature is in Preview mode. A message will appear upon entry of the solution and will disappear once the solution becomes generally available (GA). Also, office 365 level AD is required for this feature. This feature does not work with the free version of Microsoft Teams. But, at the time of this publication, Microsoft has a trial offer for this capability.*

Custom Notifications (Change Data Capture (CDC) and BPM)

Greater responsiveness in the business workflow can be more easily achieved with instant notifications guiding your processes. To offer more opportunities to build these notifications into your processes, Epicor Collaborate lets users create custom notification rules. This is achieved with the Change Data Capture (CDC) management solution.

Additionally, users can design a Business Process Management (BPM) workflow to post custom notifications in a Collaborate message stream through a new Notify Collaborate action. Users can leverage Data Directives, Method Directives, and Epicor Functions to create workflows that include the Notify Collaborate actions and the action that triggers it.

Operational Efficiency from IoT Notifications

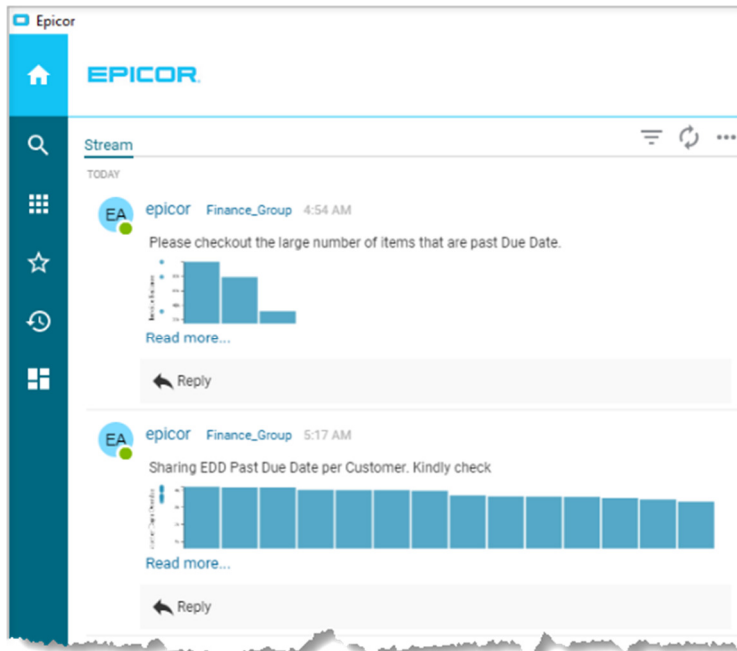
Boosting operational oversight to deliver great performance with Epicor IoT is easier in the latest release as users can view IoT notifications within Collaborate message streams. Users can configure IoT based notifications via

BPM and feeding them to Collaborate. This allows users to be notified of asset performance while collaborating with a group of stakeholders on the failure situation.

In ERP Instant Answers with Epicor Virtual Agent (EVA)

EVA's availability in Epicor Collaborate provides another avenue of communication—from your desktop or laptop—in addition to the iOS and Android EVA mobile device apps. EVA helps users automate mundane tasks such as looking up a contact or inventory information—all she needs is a simple text command. Integration with Epicor Collaborate supports EVA skills or commands within message streams. Ask EVA to show you a customer, and then the customer credit, and she will return richly formatted information. The experience and the skills supported are consistent with what is offered in the EVA mobile app. All you need do is enter @EVA in the message stream and type your query.

Actionable Epicor Data Discovery (EDD) Metrics Drive Improved Productivity



More easily communicate business metrics—visually—to your colleagues by posting EDD charts and KPIs to Collaborate. Users can spot an EDD widget on their Kinetic Home Page or EDD web page and share it, including comments that drive actions. The image is static, guaranteeing your colleagues will see exactly what you saw, and they can drill down into the image to see the live view if they have the security privileges to do so. New levels of reactive productivity can result when metrics are shared and actioned as exceptions occur, in real-time. Any key metric can be shared from sales, finance, or operations.

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

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

Epicor Data Discovery (EDD) Enhancements

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 out-of-the-box BAQs, custom BAQs or external BAQs or, with the EDD Advanced license or subscription, connect to outside data sources. Epicor IoT widgets can also be viewed in EDD with the addition of a license or subscription for Epicor IoT. Several major enhancements have been added to the EDD Advanced

application, which is available as an add-on license or subscription to the basic EDD features included with core Epicor ERP.

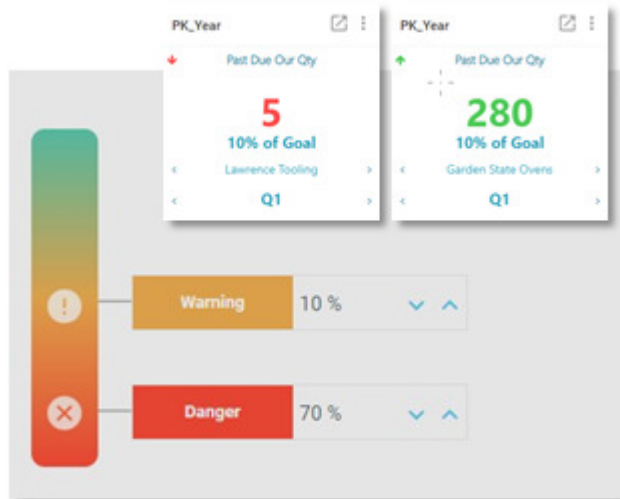
Image Overlay

We all love maps. They provide orientation. They give us a context for the data we are using, they relate most closely to our real-life experience, and they are beautiful to look at. Now an image can act as a background in an EDD visualization, with data points placed in context on the image. Imagine being able to see a map of your country or the world, with data points displaying information in different provinces or states, or a map of your plant floor as shown. Or an image of a machine, with data points related to sensor placement on the machine. Data points on these maps can simultaneously display data in two categories (dimensions) via size and color, and your users can drill down for more information. This map-based enhancement is sure to engage your users more than any other chart type and promote their use of real-time analytics for increased reactive productivity.



Key Performance Indicators (KPIs)

Visually rich, color-coded and intuitive KPI tiles and dashboards can be created in minutes with this new enhancement. This expands the KPI feature—first introduced for Epicor IoT widgets in Epicor ERP version release 10.2.400—to your other real-time data. The stoplight approach's greatest strength is its intuitive logic. Your organization sets the goals or operating parameters and then managers can see problems (or achievements!) at a glance and drill down into what requires their immediate attention, in real-time.



Epicor Virtual Agent (EVA) Enhancements

Epicor Virtual Agent, or EVA, is an artificial intelligence personified bot that provides you access to 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 match these demands, companies are increasingly turning to AI and cognitive technologies. EVA can help solve problems today and lays a strong foundation for intelligent technologies that integrate with their Epicor system. The natural synergy of EVA and Epicor ERP is underscored by a recent survey of 1,100 CTOs and line-of-business executives, who concluded, "Enterprise software represents the most popular—and easiest—path to AI."¹

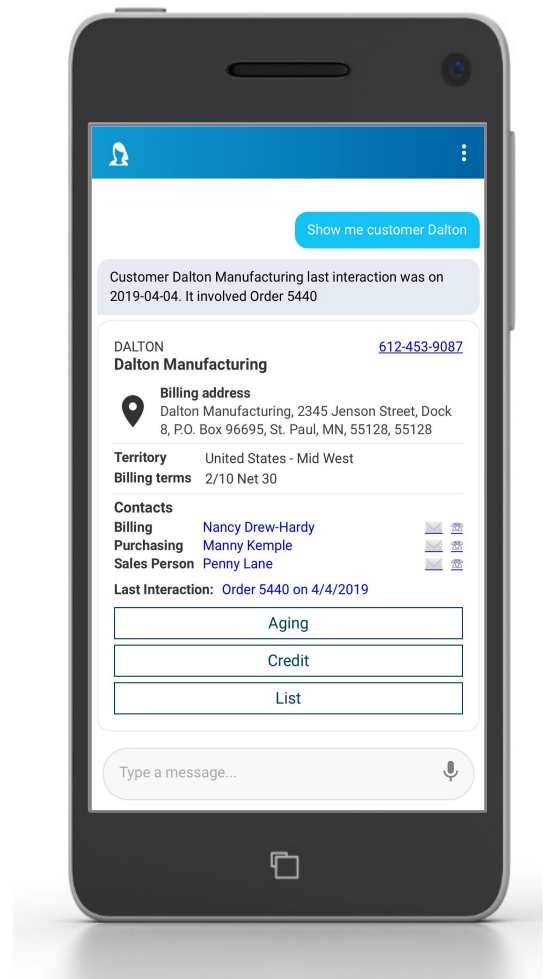
EVA benefits:

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

EVA skills:

Just launch the EVA app on your device, complete the secure login, and start texting or talking. You can access parts, pricing, and other customer and supplier information. EVA initiates actions 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 ABC part" (for example). Since EVA is aware of the conversation's context, the application knows which customer and item to quote.

The **10.2.600** release of EVA adds these new features



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>

- ▶ **Create an RMA (Return Material Authorization) for a customer** - Imagine your customer has a quality issue. You travel to the customer site to see the issue. With EVA, you can request an RMA for the customer, and she will return an RMA data card. Once you submit the RMA, the ERP system issues an RMA number back to EVA and sends it to the customer based on the contact in the ERP system.
- ▶ **EVA is available in Epicor Collaborate** - All you need do is enter **@EVA** in the message stream and type your query. See the Collaborate section for more information.

EVA subscription requirements

Epicor has decided to continue to offer the EVA app for no charge, whether it is used on an iOS or Android device or called from an Epicor Collaborate message stream. This provides a great opportunity for Epicor to continually improve the language understanding based on actual usage. Please note that future content packs which communicate through EVA may have an associated license or subscription fee. Follow the [EVA Install Guide](#) (located on [EpicWeb](#)) so that your company can get started using EVA today.

Epicor DocStar® ECM 20.1

Lost, misfiled, and delayed approvals on documents cost organizations time and money. Remote employees, compliance, and security issues add even more layers of complexity to an already-complex system. Moreover, with paper-based processes, lack of visibility into the status of cash position, workflow approvals, or changes to documents add to the difficulty of making the best decisions at the right time. DocStar ECM (Enterprise Content Management) can help improve productivity and save costs by creating a paperless workflow for document management and office automation. In fact, DocStar ECM is the only enterprise content management suite with packaged workflows deeply integrated to Epicor ERP that capture, validate, route, and automate document processing for both accounts payable and sales order entry.

DocStar ECM/Advanced Printing and Routing (APR) Suite Benefits

- ▶ Provides an **ISO 9001** compliant enterprise content management system for such documents as manufacturing assembly instructions, forms, procedures, process maps, work instructions, and quality records.
- ▶ Leverages smartphones and tablets by using a web browser interface for access anytime, anywhere
- ▶ Minimizes business risk associated with lost files
- ▶ Enables easy, secure file sharing
- ▶ Reduces learning curve with elegant, intuitive design
- ▶ Provides office automation to route and process business documents more efficiently, faster, and more accurately
- ▶ Integrates to Epicor ERP for storage of documents and attachments, pre-built automated processing of documents for sales order entry and accounts payable, and additional custom workflow processing

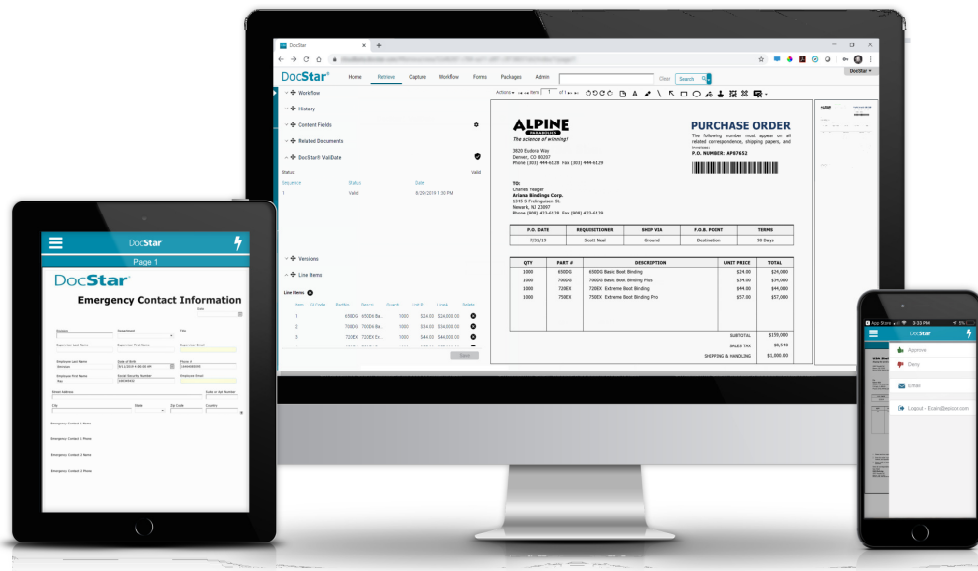
DocStar ECM 20.1 Enhancements

DocStar ECM 20.1 is scheduled to be released at the same time as Epicor ERP 10.2.600. Enhancement highlights include:

- ▶ **Document Attach Connector for Epicor ERP** – this is a new module that will provide the ability for documents managed in DocStar ECM to be linked automatically, via workflow,* to the appropriate records in Epicor ERP when documents are scanned or imported directly into the DocStar ECM repository. The result is that when a user is viewing a record in Epicor ERP, they will see the document file attachment and can select it for viewing or handling in DocStar ECM.

NOTE: DocStar ECM Document Attach Connector for Epicor ERP requires a software license or subscription for use. A Professional Services engagement is recommended to set up appropriate DataLinks and Workflows to use this application. This capability is already included in the feature set of both the DocStar ECM AP Automation Module and the DocStar ECM Sales Order Automation Module for Epicor ERP.

- ▶ Epicor Kinetic-Themed User Interface – this provides a more contemporary, cleaner interface for a pleasing user experience.
- ▶ AP Automation Enhancements
 - Epicor ERP integration – now has a re-architected technology and uses the REST API for an even faster implementation of the product and better performance for invoices that can have thousands of lines.
 - Auto Receipt Matching – when performing a three-way match between purchase order, invoice, and receipt, some customers may be confronted with hundreds or thousands of receipt lines to choose from. Automatic matching enhancements will now work to eliminate all but the most possible matches to choose from, and most of the time will go ahead and do the matching automatically without requiring any user intervention.
- ▶ Workflow Application of Stamps – Traditionally, rubber stamps have added to the importance of a document. A bright green “Approved” is very easy to see too. Previously you could manually apply an image stamp that looked like a rubber stamp and now, in a workflow, you can add an image stamp automatically or a dynamic stamp that shows, for example, the stamper’s name and stamp date.
- ▶ User Requested Enhancement – Field search now has a “does not equal” parameter choice.



Cloud

Multi-region Multi-company Cloud Transactions

New in Epicor ERP 10.2.600 is the ability to enable a distributed cloud or hybrid cloud business model to unify your business and accelerate your strategic growth plans. With this feature, you can now enable multi-company transactions to occur among separate, distinct instances of Epicor ERP either—

- ▶ Across Microsoft Azure datacenters in different geographies (distributed cloud)
- ▶ Across Microsoft Azure datacenters to on-premises locations (hybrid cloud)

For multinational organizations with company locations across the globe, you can now gain a consolidated view of multi-company transactions without needing all to run out of a single Epicor ERP Cloud database in a single Azure datacenter. With the Multi-region Multi-company Transactions, you gain new freedom to connect intercompany transactions such as purchasing, sales orders, and reporting across multiple ERP instances. These instances, or databases, can serve any number of company locations, in the cloud or on premises, so you can roll out a cloud strategy in phases, meet local requirements, and improve global visibility and alignment.

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

Enterprise Search – Advanced Index for Public Cloud

With the release of Epicor ERP 10.2.600, Epicor cloud customers can fully leverage the advanced features in indexing available in the Enterprise Search – Advanced module. Users can modify search indexes to fit their business needs.

Enterprise Search – Advanced requires additional subscription or license. For these details contact your customer account manager.

EDI from Epicor

Introducing a New Cloud-based Solution for EDI

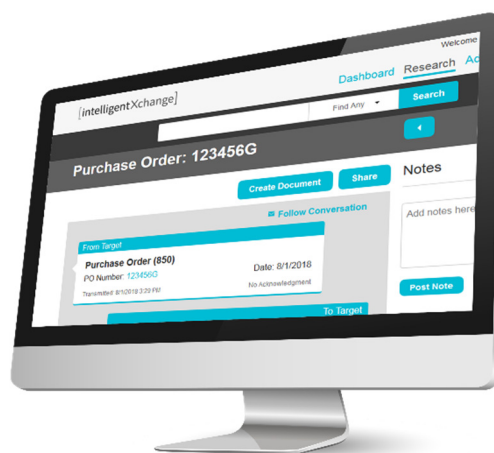
Recently, Epicor acquired 1 EDI Source, an industry leading provider and 30-year veteran of EDI solutions, including value-added EDI services, business-to-business (B2B) integrations, and EDI communications. With a strong focus in manufacturing and consumer packaged goods, Epicor now offers EDI support, unified under one organization, directly for Epicor ERP businesses. Like the Epicor strategy of deployment choice, the comprehensive product portfolio available through this new acquisition is deployed in the cloud or on premises and additionally, there is a managed service offering for those interested in letting Epicor manage the headaches of EDI for them.

Changing direction and expanding the reach of your business is in sight. Our EDI solutions are compliant with leading supply chains and retailers including Caterpillar, General Motors, Eaton, General Electric, Amazon, Walmart, Lowe's, Kohl's, and many more.

Solutions now available direct from Epicor

Epicor now offers the following offerings for your EDI needs:

- ▶ [HGX] HXchange™ – This powerful EDI Platform combines an industry leading EDI mapping and translation software and secure data encryption solution with a comprehensive view or portal of EDI document workflows for easy, one-click trading partner onboarding and EDI management
- ▶ [MX] ManagedXchange™ – This complete, managed service offering, employs EDI experts to reduce the headache of maintaining maps, validating transactions, and staying compliant. Our managed services and 24/7 support are designed to monitor your most important business relationships while helping you lower your overall IT investment.
- ▶ [ix] IntelligentXchange™ – EDI analytics improve supply chain visibility through all EDI transactions via the Dashboard or conversational Research view in this EDI analytics tool.



Integration with Epicor ERP

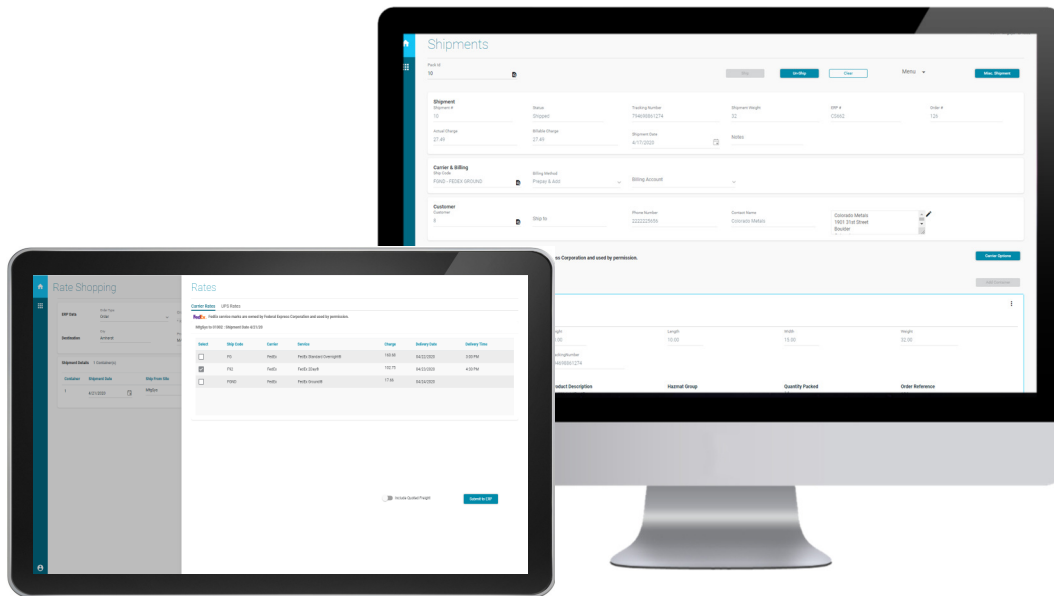
Ready to meet your needs for EDI, the new 1 EDI Source platform offering is integrated with the EDI/Demand Management module in the latest release of Epicor, Epicor ERP 10.2.600. Depending on needs, earlier versions may be available.

Epicor continues to serve the needs of our TIE Kinetix EDI users and has no plans to discontinue service. If interested in learning more about the expanded capabilities of this offering, please contact your customer account manager. EDI solutions are available for on- premises and cloud deployments of Epicor ERP. Additional subscription—for on- premises or cloud—is required for this solution. For these details and to inquire about deployment for cloud users, contact your customer account manager.

Material Management

Epicor Quickship 5.3.0

Epicor Quick Ship integrates seamlessly with your Epicor ERP platform to help you process shipping transactions quickly and efficiently. Epicor Quick Ship uses the Epicor Kinetic Design System.



Features that are available with this release include:

- ▶ Data mapping tool – this tool will allow customers to map user-defined fields from E10 to Quick Ship. Previously this was only available as a custom request.
- ▶ Freightquote.com integration – allows customers to rate shop up to 20 LTL carriers and dispatches the selected carrier.
- ▶ Loomis and Canada Post carrier integrations – rounds out the integrations with Canada's major carriers.

Benefits of automating your shipping processes include improved customer service, reduced and eliminated surcharges and fines, streamlined tasks, reduced overall freight spend and easier onboarding and training of new employees.

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

PCID (License Plating) Transfers

Package Control Identification (PCID) capabilities have been expanded for this release. This functionality allows users to track, manage, or transact a group of items via a unique identifier, the PCID.

This release expands on this capability that was previously limited to only one site, factory, or location. Users can now ship and receive the same PCID from

one site to another site without having to receive each item or to unpick individual line items.

Customers who need to efficiently track inventory and/or need to consolidate received goods will benefit from this capability. The higher the volume of inventory and the larger the number of sites involved in the manufacturing or distribution process, the greater the benefit.

PCID is available as part of the Advanced Material Management (AMM) module. If shipping and/or unpicking of PCIDs is a requirement, this capability works best with the Epicor Mobile Warehouse product to speed up the processing of inventory and improve data quality.



Production Management

Epicor Quality Management System (QMS)

Epicor Quality Management System (QMS), powered by ETQ Reliance® is the most powerful, flexible and easy to use QMS solution available on the midmarket. For customers in industries such as heavy industrials, food and beverage, electronics, medical devices, life sciences, chemicals, aerospace and defense, automotive and commercial aviation life sciences, Epicor QMS enables customers to optimize the critical quality processes that drive product and service excellence and deliver clear business advantage for their organization.

- ▶ Ease of use: With streamlined solutions and optimized user experience, users will be more productive more quickly than ever.
- ▶ Extend ERP with Best Practices: Shorten your organization's time-to-value with ERP integration and over 35 built-in best practice quality processes.
- ▶ Flexibility: Accommodates your needs and process requirements. Easy no-code configuration.
- ▶ SaaS: Rapid on-boarding and implementation, always-on, always-updated, redundant, secure, auto-scaling infrastructure and a lower total cost of ownership.

Base Solution			
Includes Adaptive Cloud Multitenant Platform, Quality Essentials, Nonconformance Handling and Epicor ERP Integration Centralized Reporting (350+) & Alerts Delegation & Escalation Drag/Drop Process & Form Config Audits Management Corrective Action (CAPA) Document Control Training Management Change Management Risk Register Supplier, Materials and Chemicals Inspection & Testing Non Conformance Reporting Return Material Authorization (RMA) Planned Deviation Receiving & Inspection Advanced Product Quality Planning (APQP) Customer Feedback Epicor ERP Integration (Note: Requires Epicor Quality Assurance module)			
Supply Chain Management		Quality by Design	
Supplier Corrective Action (SCAR) Supplier and Material Qualification Supplier Rating Production Part Approval Process (PPAP)		Assets, Calibration, & Maintenance Product Specification Management Failure Mode and Effects Analysis (FMEA) HACCP (Food and Bev)	
Complaints Management for Life Sciences	Enterprise Risk Management	Health & Safety Management	Environmental Management
21 CFR Part 11 and Annex 11 Compliance Electronic Signature Compliant Handling Validation Instance	Compliance Obligations Task Management Meetings Management Risk Surveys Emergency Preparedness Quality Records Disposition	Job Safety Analysis (JSA) Behavior-Based Safety (BBS) Accidents & Safety Reporting Safety Data Sheets	Aspects, Objectives & Targets Permit Control Chemical Approval Sustainability Reporting
Additional Robust Cloud Offerings			
Government Cloud (ITAR), HIPAA Instance, Additional Instance, Additional 100GBStorage, Epicor QMS Read-Only Users			

Quality is under pressure

As regulatory and compliance standards grow more stringent, supply chains lengthen and become more complex, data is distributed in silos across an enterprise and decision making becomes ad hoc and reactionary. Consequently, quality and the people responsible for ensuring they are under more pressure today than ever before.

Rock-solid product quality is the backbone of brand reputation and brings a premium to quality-centric organizations. Quality products and services establish and reinforce lifelong loyalty, market dominance, and profitable businesses. Epicor QMS helps market leaders design, deliver and optimize comprehensive quality management systems (QMS) and environmental, health and safety (EHS) management programs for multi-national organizations as well as mid-sized businesses. Epicor QMS serves the strongest companies in the world and our software helps them stay that way.

Epicor QMS Agile Platform

Epicor QMS Platform, the foundation solution, includes capabilities and processes that drive the most critical and fundamental quality management programs. The Epicor QMS Platform can be augmented with individual or multiple solutions that bring new functionality to meet specific QMS, EHS and compliance needs.

Epicor QMS Solutions

Build on the platform with one or all of our many solutions, our solution set is a group of related management processes that drive operational efficiencies enabling customers to achieve their journey toward excellence while delivering a clear business advantage.

Non-Conformance Handling

Minimize customer complaints, mitigate the cost of poor quality and build a stronger brand reputation by continuously improving processes and products, capturing all issues and addressing them to prevent reoccurrence.

Supply Chain Quality

Verify finished product quality with automated control and visibility over all elements of your supply chain, from local manufacturers to global suppliers. Track suppliers and materials, build qualitative and quantitative supplier ratings and trigger actions to improve supplier quality and performance.

Quality by Design

Build a culture of quality, starting with step one of the product and service design process. Analyze product and process plans, establish metrics and benchmarks, and track the most critical quality processes across an organization.

Health and Safety

Move from a reactive problem-based approach and build a culture of workplace safety with a proactive, risk-based program that minimizes hazards in the workplace and enables the effectiveness of controls.

Environmental Management

Make environmental management a strategic business priority. Identify environmental impact targets, log permit information, oversee wastewater and emissions management and track sustainability initiatives.

Enterprise Risk Management

Automate several key quality processes that allow companies to incorporate risk-based thinking into organizational planning and operational monitoring. Identify and objectively assess risks companywide and leverage risk data to drive long-term mitigation and improvement.

Complaints Management for Life Sciences

Turn regulatory and compliance requirements from an obligation into a strategic advantage. Automate Complaints Handling and regulatory submission in compliance with 21 CFR Part 11 guidelines.

Extending ERP

Epicor QMS integrates with Epicor ERP for rapid implementation and to support the integration of non-conformance workflow between Epicor ERP production, inventory, and finance to verify accurate cost of quality.

Additional subscription is required for this SaaS solution. For these details and to inquire about deployment for users, contact your customer account manager.

Epicor Advanced MES 8.3.1

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

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

Part Lot/Serial Traceability

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

Microsoft SQL Server Reporting Services (SSRS) Support

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

Machine Interface Unit (MIU) OS Upgrade

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

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

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

EDA Energy Monitoring Content Pack

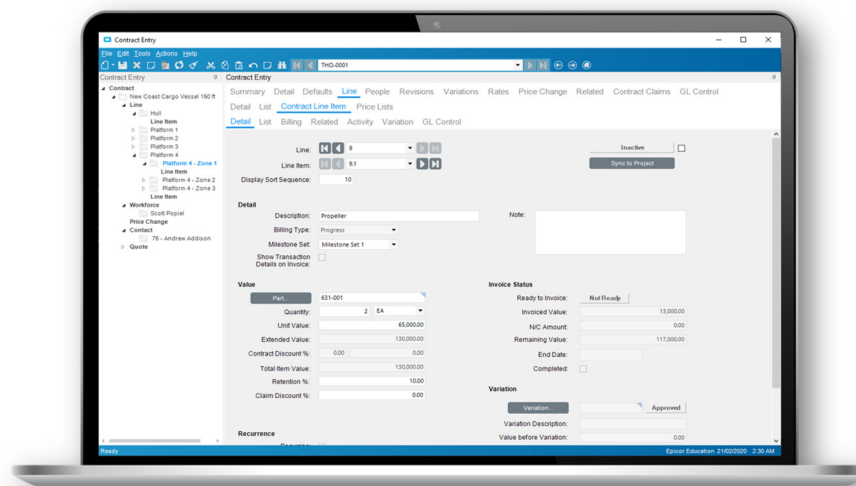
In the Epicor Advanced MES (Mattec) 8.3.1 release we are also pleased to announce an expansion to the Epicor Data Analytics (EDA) content pack to include Energy Monitoring.

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

Project Management

Epicor Advanced Project Management

Epicor Advanced Project Management extends the functionality and flexibility of the Project Management module. It helps address the challenges of contract management and multifaceted projects with an integrated solution that provides complete functionality to manage projects, contracts, claims, subcontractors, variations, and revenue recognition. Generate efficiencies in your business, improve cash flow and forecasting through effective



management, and eliminate manual entries from your revenue recognition process to keep mistakes to a minimum.

The Epicor Advanced Project Management Suite has three modules that can be used individually or together depending on your business' needs:

- ▶ Advanced Project Accounting: Manages the financial viability of the projects. Includes Cost Codes, Project Analysis, Project Ledger, and Project Accruals functionality.
- ▶ Advanced Contract Management: Manages the financial relationship between the business and the customers. Features include Contract Order Maintenance, Tendering Process/Bid Management, Multiple Billing Types under one contract, Progress Claims and Applications for Payment.
- ▶ Advanced Subcontract Management: Manages complex contractual arrangements with subcontractors. Features include Subcontract Order Management, Progress Claims and Applications for Payments and Reports like Subcontractor Commitments, Progress, and Retentions.

For ERP on-premises and cloud customers running 10.2.600 or later. Epicor Project Management is a pre-requisite. For licensing and pricing details contact your Customer Account Manager.

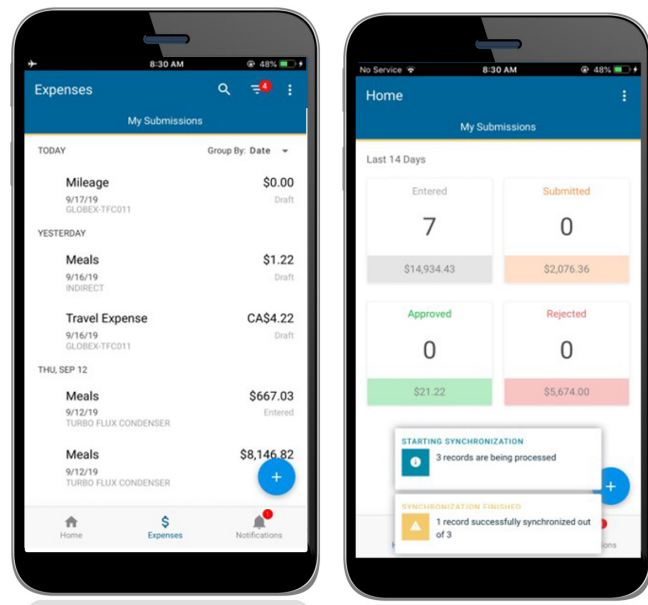
Epicor Time and Expense Management Mobile Enhancements

The Epicor Time and Expense Management Mobile Applications are extensions of the Time and Expense Management modules. They provide a modern, intuitive user experience that simplifies time and expense reporting and tracking processes. Eliminate the burden of the usual manually intensive processes, allowing users to enter, submit and approve timesheets and expense reports on the go, using the device of their choice as they are compatible with iOS and Android operating systems

With ERP 10.2.600, we continue enhancing the offline capabilities of the applications, which is one of the most popular features among users. In addition to viewing and creating timesheets and expense reports without an internet connection, users can now:

- ▶ Edit their submitted timesheets and expense reports
- ▶ Submit, approve and reject timesheets and expenses with supporting comments
- ▶ Auto-sync records once internet connectivity is restored and manage any existing sync conflicts
- ▶ Select recently used jobs or projects, to avoid manual entry while creating new timesheets and expense reports

For both applications, we also added support for attachments integration with Dropbox and Google Drive.



Available for on-premises and cloud deployments of Epicor ERP running 10.2.400 and later. Epicor Time and/or Expense Management modules are required. These applications don't require separate licensing, you access them through the Time and or Expense module(s) concurrent licenses.

Financial Management

AR Centralized Collections

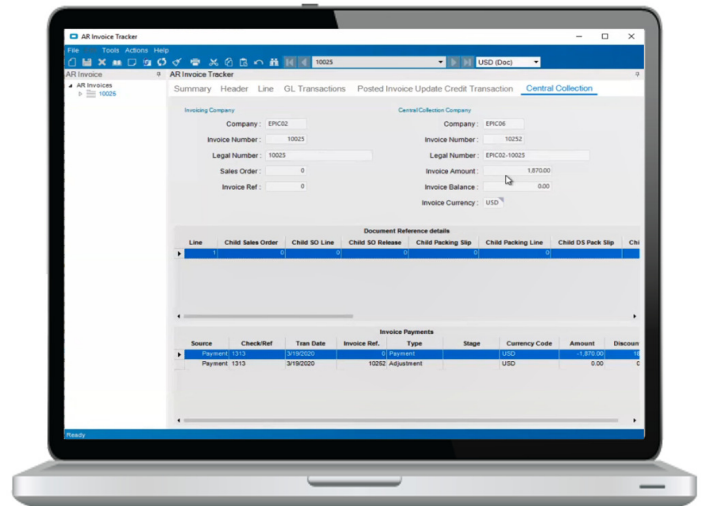
The AR Centralized Collections functionality provides a treasury centralization solution, a strong corporate control on strategic customers, allowing to reduce duplicated work and processing costs in subsidiaries, improving efficiency and reducing financial risk.

In a multi-company environment, when a global customer is set to be part of the central collection, all the AR invoices issued to this customer in multiple Epicor ERP child companies can be paid from a single parent company.

The AR centralized collections functionality utilizes multi-company transactions and inter-company accounts to communicate the invoice and payment information between the companies. A new, arbitrary invoice group prefix helps to identify invoices as part of the centralized collections.

The invoices remain in the individual companies to keep sales data accuracy, it is only the invoice payments that are centralized.

In this release, only miscellaneous and shipment invoices are supported. Multi-currency environments are fully supported. The Multi-Site Management license is a prerequisite. This solution is compatible with Epicor Commerce Connect (ECC) and Epicor Cash Collect.

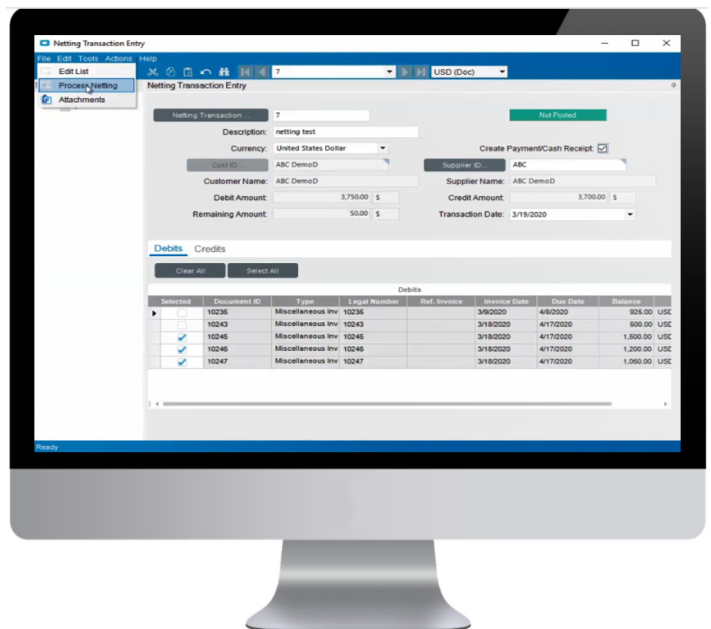


AR/AP Netting Settlement

If your company does business with a trading partner that acts both as a customer and a supplier at the same time, you can perform a netting of the outstanding AR and AP payments to increase efficiency and reduce operational costs.

The AR/AP netting functionality allows a manual or an automatic selection of transactions to consolidate. Invoices need to have the same currency in the netting process. The netting can only happen between one customer and one supplier, it is not possible to make one to many (1:N) relations.

If required, the functionality can also generate a new AP payment or a new AR cash receipt as a result of the netting process.



AR/AP Invoices - Withholding Tax Timing Option Through Interim Accounts

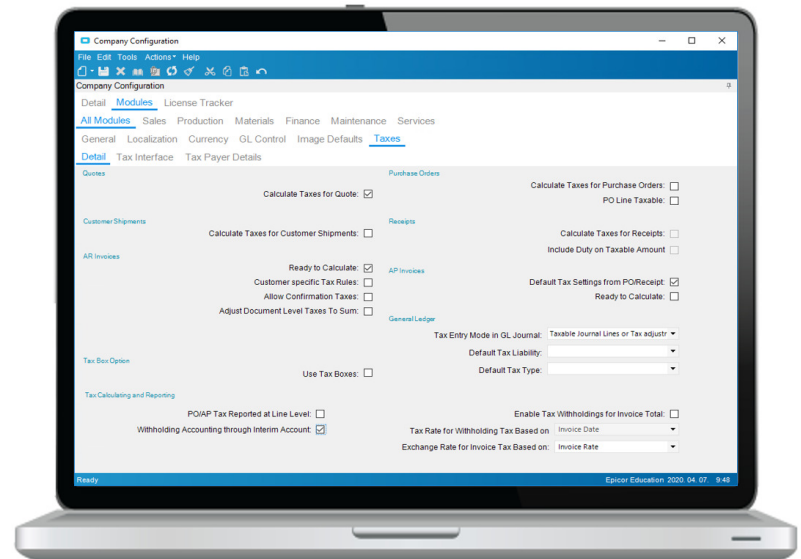
A withholding tax, or a retention tax, is an income tax to be paid to the government by the payer of the income rather than by the recipient of the income. The tax is thus withheld or deducted from the income due to the recipient, requesting businesses to withhold and pay taxes on the invoice (i.e. VAT or sales tax) or a part of these directly to the state treasury during the purchase processes, instead of paying the full gross amount of the invoice to the supplier.

Typically, the withholding tax is treated as a payment on account of the recipient's final tax liability, when the withholding is made in advance.

Businesses need to live up to the most stringent requirements and pay withholding taxes the most efficient way.

It assures increased transparency over withholding taxes and allows a better reporting to tax authorities.

The new functionality allows posting the withholding taxes to an interim account at the time of posting the invoice both on the AR and AP side. When the invoice payment is paid and posted to GL, the withholding tax is booked from the interim account to the accrual account.



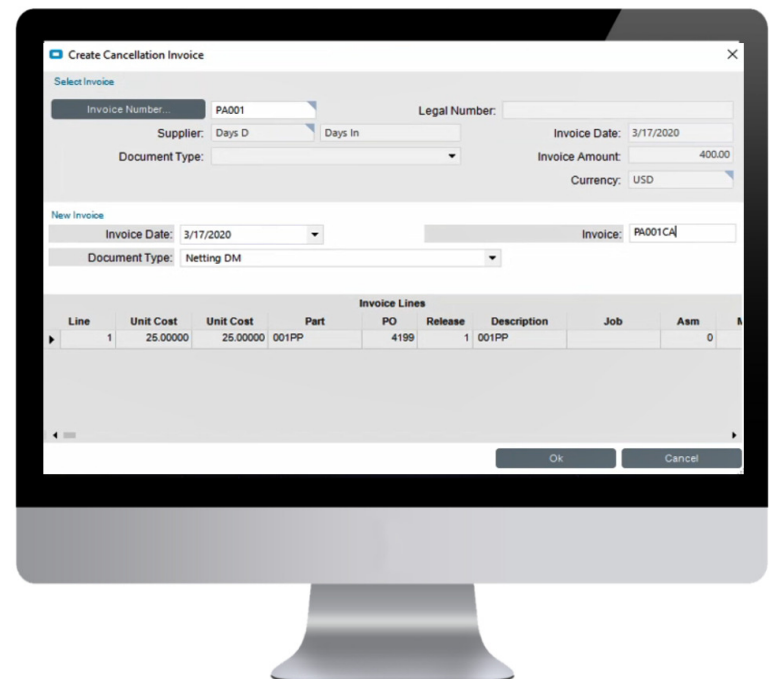
AP Invoice Cancellation

As part of the current AR process, it is possible to make an AR invoice cancellation by modifying the related documents (Shipment and Sales Order).

To complete the cancellation process, new functionality is introduced on the AP side. AP invoices can be canceled along with the capability to perform corrections to the AP invoice and related documents (Purchase Order and Receipt).

This new functionality reduces time spent on a manual AP invoice cancellation process, it eliminates human errors and provides increased security to the AP invoice process.

Only miscellaneous and shipment invoices are supported. In case of partial invoices and payments, the final invoice has to be canceled first, then the partial invoices can be canceled. The re-entry of the AP invoice can use the same invoice number.

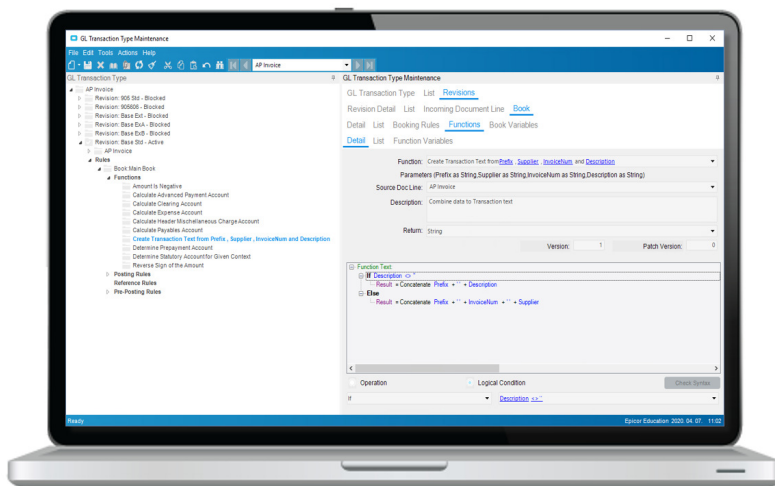


Financial Transactions – Enhanced Descriptions

In the accounting practice, it is mandatory to provide a GL journal detail description of the transaction which will be also shown on the different financial documents and reports such as (government/audit reports, invoices, etc.) provided to the financial stakeholders.

A user-defined transaction description is available for all financial transactions. The minimal length of the transaction description field was extended to 100 characters so that more meaningful and informative descriptions could fit with abbreviations.

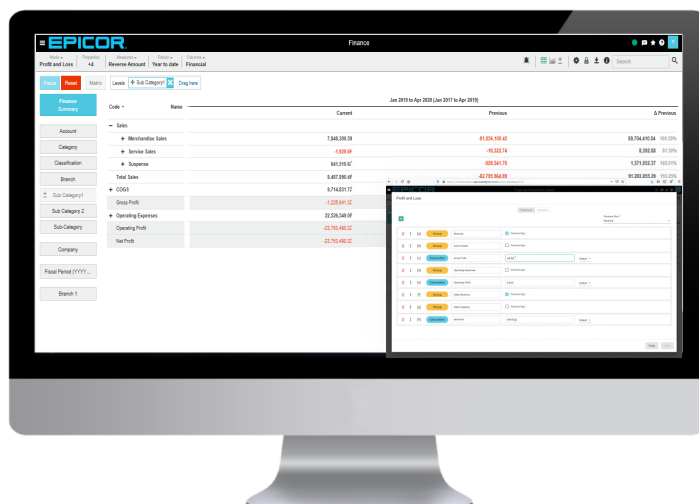
In Epicor ERP 10.2.600, the standard posting rules were changed to support longer descriptions for the AP Invoice, Debit Memo, Payment Instrument, AR Invoice, Credit Memo/Cash Receipt, AR Instrument transaction types.



EDA Financial Statements

Epicor Data Analytics (EDA) sees the introduction of a new optional module EDA Financial Statements. It offers access to four financial statements: Profit and Loss, Balance Sheet, Cash Flow, Trial Balance with consolidation capabilities. The built-in financial statement builder allows to modify the standard financial statements or create new ones. Export your financial statements with groupings in MS Excel format.

EDA license is a prerequisite. Additional license and/or subscription is required for this solution. For these details and to inquire about deployment for cloud users, contact your customer account manager.



Epicor Payroll Processing Notifications and Flexibility

Improved practices in pulling labor for processing checks is deployed in the latest release of Epicor ERP. For Epicor Payroll users, the system now does the checking for you, validating that labor transactions are ready for processing. The following checks are now being applied.

- ▶ Notification that some labor entries in the payment period are not approved and were not transferred.
- ▶ Notification that some labor entries are outdated (payroll date before payment period, but not marked as 'Transferred to Payroll').
- ▶ Notification that the hours in payroll checks are out of the payment period and are not included in overtime calculations. This makes it easier for the user to verify the correctness of overtime calculations.
- ▶ Warning when manually entered/changed date is out of payment period range

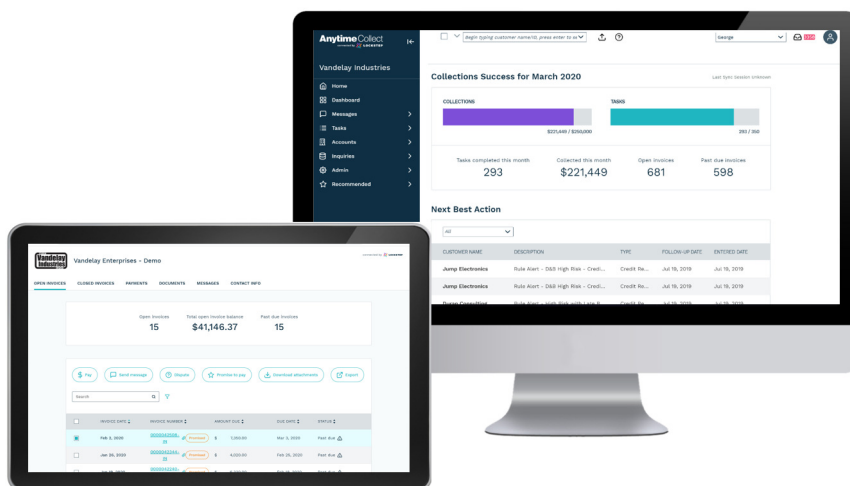
Also, new flexibility in payments is introduced with the ability to transfer outdated labor entries to payroll checks when checks are generated. This ensures that employees can be paid correctly.

Epicor Cash Collect 4.2.

The fully cloud-based Epicor Cash Collect product allows you to automate your customer communication and offers a full solution to credit and collection activities. It efficiently reduces Days Sales Outstanding (DSO) with workflows, dashboards, cash receipt projection.

Four new optional modules are introduced as part of the Epicor Cash Collect product.

- ▶ Customer Portal – Customers can self-service their invoices on a webpage. They can overview invoices and make payments online.
- ▶ Communications Assistant – Place calls from within Epicor Cash Collect, which is then recorded, transcribed and stored in the system as searchable texts. Send automated text (SMS) messages to customers.
- ▶ Document Creation – It provides a PDF print driver that enables printing of invoices in batches.
- ▶ Advanced Workflow – Create custom workflows outside of the standard workflows within Epicor Cash Collect.



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

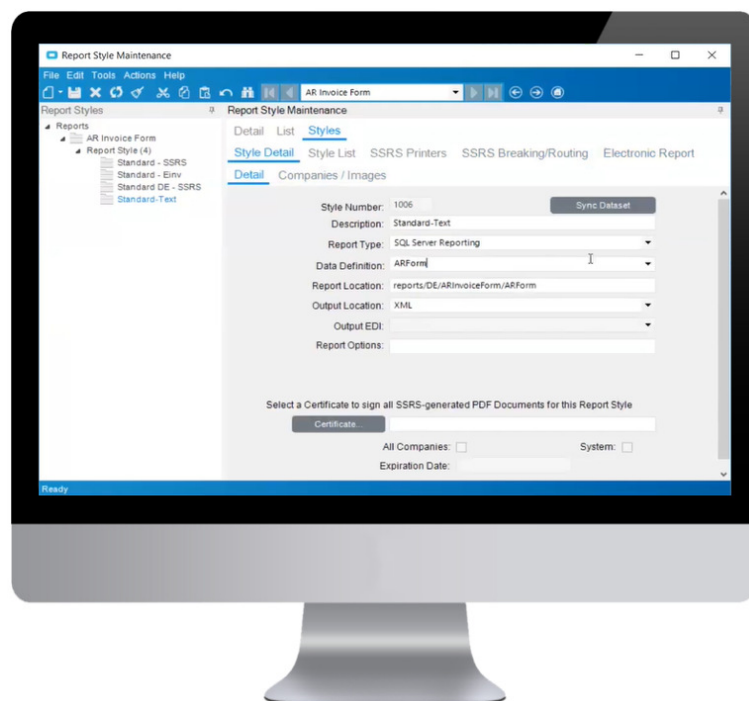
Epicor Electronic Reports

The former Electronic Compliance Engine was renamed to Epicor Electronic Reports to better express its capabilities. This module can not only deliver legally required electronic reporting solutions but any types of electronic reports and e-invoicing solutions.

In this release, the capability of supporting PDF/A-3 format is introduced, as well as generating digital signatures for PDF and PDF/A-3 output files.

The new PDF/A-3 format is a combination of a human-readable PDF file and an internal, embedded attachment in the PDF file which can be an XML file that is used for integrations, computerized processing.

Utilizing the built-in certificate management capability, the electronic data files generated by Epicor Electronic Reports, such as e-invoices, electronic documents, or electronic reports can be now digitally signed with the selected certificate.



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

ICE Framework and Tools

Epicor Functions Enhancements

With the introduction of Epicor Functions in 10.2.500, customization capabilities in Epicor ERP now offered a no-code, low-code alternative to tailoring the system. Cloud users benefit from this capability in that it offers greater resiliency in upgrading and coders themselves can reuse Functions or custom methods in their modifications. The latest release expands this toolset with key functionality asked by users. In particular, the following features are now available:

Function-to-Function

Users can build Functions and call other Functions within them. This greatly expands the ability to reuse Functions, build and maintain once for multiple use cases. In particular, users may choose to use an internal Function rather than expose external callers via REST.

Function Scheduling

Automating processes in ERP helps drive new levels of productivity and eliminates redundant tasks – leaving users the freedom to work on value-added tasks. In introducing the ability to schedule Functions, Epicor ERP delivers on automation of workflow, facilitates integrations seamlessly, and makes maintaining the system that much easier. With each scheduled Function, users can specify Function request parameters.

Functions Managed in Solution Workbench

Maintaining modifications that include Functions from release to release is easier with management in Solution Workbench. Function libraries can be installed and automatically published as part of a solution.

Calling Functions from Client with C# Customization

Greater access to Functions is delivered with the ability to leverage Functions directly from custom code of your client customization. The C# REST Client Builder allows creating call content and calling a Function via REST. Not only can users leverage Functions in C# client customizations, but the functionality also supports specifying parameters, execution of the call and handling the response.

Asynchronous Function Calls from BPM Workflow

Users can execute asynchronous Function calls from BPM Directive workflow. When you call a Function asynchronously, the call is queued and executed by the BPM system tasks which are part of the Epicor ICE Task Agent service running behind the scenes.

Functions Can Update Database Tables

Widget Functions with Custom Code and Customs Code Functions can now update referenced database tables from their custom code and expressions provided the library's DB Access from Code setting is set to Read Write.

Functions Support in REST API Interactive Help

Making it easier to confirm Functions, users can now dynamically test Epicor Functions using the Epicor REST API Interactive Help resources.

Functions with Epicor Collaborate

Building standard and reusable notifications are simplified. Functions can be used to create a workflow that includes the Notify Collaborate action. Epicor ERP posts notification messages in the Epicor Collaborate message stream when the action is triggered.

Cloud Storage for Documents

Cloud storage has become common for businesses looking to enable inexpensive, secure, untethered access to their business and product documentation. Traditionally Epicor has offered support for File Server, Microsoft Sharepoint, and DocStar document storage. With the release of 10.2.600, Epicor Document Management (File Attachments) functionality expands to offer support for both Google Drive™ and Dropbox for document storage.

To simplify management of attachment locations, as options have expanded, Epicor delivers a new Attachment Type Maintenance program in System Setup.

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

Improvements to Existing CSFs

Several country-specific functionality (CSFs) packages are improved in 10.2.600:

- ▶ Poland
- ▶ Indonesia
- ▶ Thailand
- ▶ Taiwan
- ▶ UK
- ▶ Germany
- ▶ France
- ▶ Portugal
- ▶ Netherlands
- ▶ Sweden
- ▶ Norway
- ▶ India
- ▶ UAE
- ▶ Mexico
- ▶ Colombia
- ▶ China
- ▶ Malaysia

Features offered in the CSF updates include support for the EORI (Economic Operators Registration and Identification) number and Electronic Reports PDF/A3 formats for electronic invoices. For a complete list of updates for these countries, review the Feature Summary.

Third-Party Applications and Integrations

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

Epicor 10.2.600 supports the following products:

- ▶ Epicor AgileShip Manifest from Agile Network, LLC
- ▶ eVision® from TIE Kinetix
- ▶ Epicor Precise Point of Sale from Precise Business Solutions

- ▶ Epicor Advanced Requisition Management from Precise Business Solutions
- ▶ CADink™, ConfigLink, Nest and ECN Manager from QBuild Software Corporation
- ▶ Epicor Product Life Cycle Management and Product Data Management from PROCAD GmbH & Co. KG
- ▶ Epicor XL Connect from 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.
- ▶ Epicor Service Pro from MSI Data.
- ▶ Epicor Quality Management System (QMS) by ETQ, LLC

Compatibility

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

In this release, Epicor officially drops support for Windows 7, Windows Server 2008, Windows Server 2008 R2 and has added support for Windows SQL Server 2019 to Epicor ERP 10.2.

For more information about compatibility, see the [Epicor ERP Hardware Sizing Guide](#) on EpicWeb.

Sustaining and Retired Products

With the release of 10.2.600, Epicor will not be continuing to enhance several solutions because of obsolescence, next-generation replacement product availability, or low product market acceptance. In some cases, there may be business terms tied to these changes. In these cases, your customer account manager will have the latest information. Below is a list of these products for the 10.2.600 release that are transitioning to sustaining support and/or are being retired. We will continue to support these products on earlier releases of Epicor ERP.

- ▶ Epicor Automated Testing (ATE) is moving to Sustaining Support as of release 10.2.600.
- ▶ Epicor Social Enterprise (and Advanced Social Enterprise) moved to Sustaining support with the 10.2.500 release. It is being retired at 10.2.600 and will no longer be available for use with 10.2.600. Earlier versions will continue to be supported as Sustaining.

Upgrading to 10.2

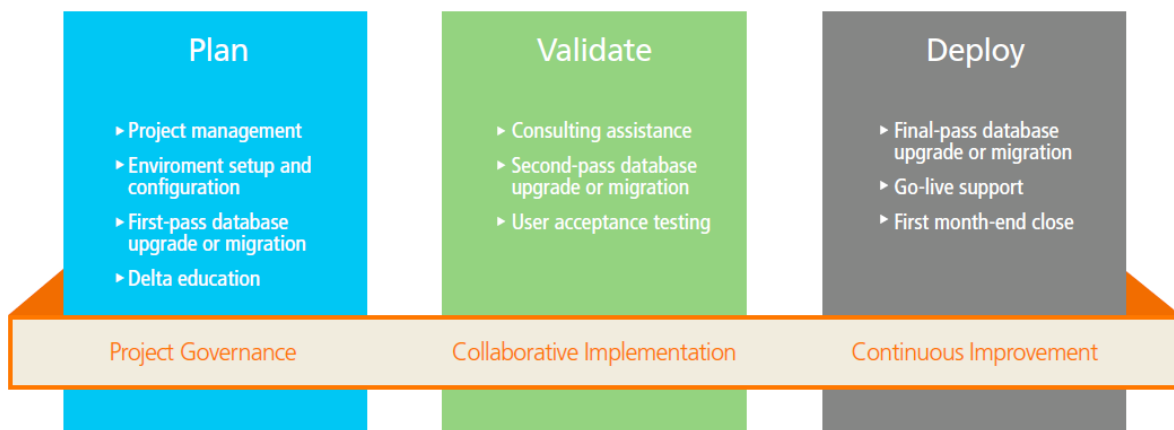
At Epicor, we firmly believe all users gain significant benefit by upgrading to new versions of the Epicor ERP software. For users on the Epicor ERP 10 platform, the upgrade process is simplified so you can move between releases without stepping through each one. For example, users can move from 10.1.400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

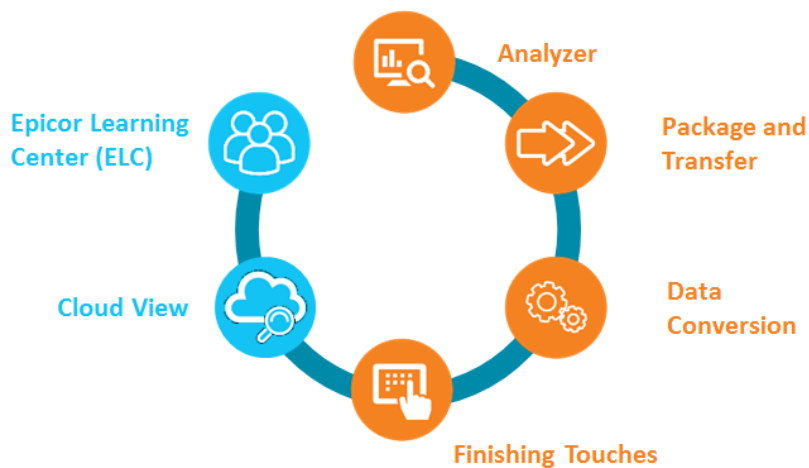
Upgrade Signature Methodology



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.



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

Tim Ward, CIO
Martin Automatic, Inc.

Analyzer

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

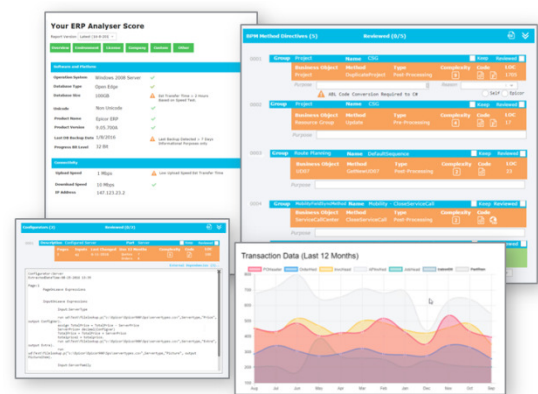
Packager/Transfer

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

Data upgrade

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

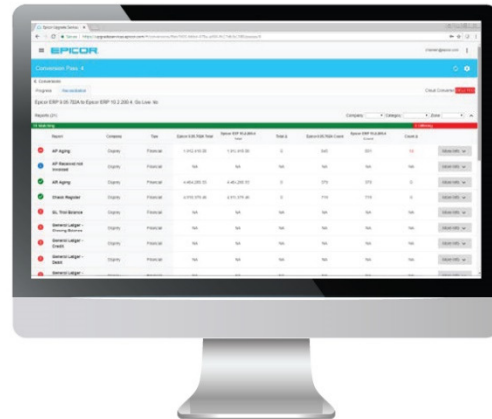
Epicor ERP 9 users no longer need to be at a specific release of 9.05. Instead, the data migration automatically upgrades data from any version. For Vantage and Vista users, the upgrade works for any database at version 8.03.305 and later. Earlier versions can upgrade to 8.03.305 regionally or with assistance,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



Reconciliation Reporting

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

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



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

Epicor Learning Center Upgrade Essentials courses

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

Cloud upgrade tooling and services availability

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

*Customer Account Manager

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

Epicor has seen great success in migrating Altec customers to DocStar ECM, and we encourage all remaining Altec customers on Epicor ERP 10.1.600 and higher to move to DocStar ECM to take advantage of new features and help ensure business continuity. DocStar ECM is an Epicor owned product that will continue to be actively developed and enhanced for Epicor ERP going forward.

The basic migration path is as follows:

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

Note: DocStar is available for Epicor ERP versions 10.1.600 and above. Some of these versions are also in [Sustaining Support](#) mode, but for purposes of migration, sales of DocStar ECM modules are permitted.

For pricing details, contact your Customer Account Manager.

Epicor Support

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

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

Application Support (for certified Epicor applications):

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

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

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

Hours of Availability

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

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

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

Advanced Support Tools

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

Online Support Center

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

Product Updates

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

Support Offering: Essential and Pro Support

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

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

With Epicor Essential Support all customers can access:

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

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

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

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

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

Support Offering: ECC 24X7 Support

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

New Support Offering: Extended Support

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

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

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

Software Support Lifecycle

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

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

Product Release	Release Date	Support Stage	End/Transition Date
Epicor ERP 10.2.500	October 17, 2019	Active	Move to Sustaining October 17, 2021
Epicor ERP 10.2.400	May 16, 2019	Active	Move to Sustaining May 16, 2021
Epicor ERP 10.2.300	October 17, 2018	Active	Move to Sustaining October 17, 2020
Epicor ERP 10.2.200	April 19, 2018	Active	Move to Sustaining October 1, 2020 (See guidance from support for a one-time defer of the move to sustaining)

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

User Groups

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











Epicor University



Epicor University provides learning tools, content, and training opportunities that enable you to achieve your business goals. The suite of tools available offers comprehensive training options that align with the different learning styles and needs of your employees, as well as in-product quick solutions that will deliver fast answers, allowing your team to stay focused and productive with the task at hand. The below graphic represents content that is new for our 10.2.600 release across our learning resources:

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

What's New for Epicor® ERP 10.2.600



EPICOR.

Introducing the Epicor Help and Support Panel

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

Guided Learning:

Using the concept of learn-as-you-go, Guided Learning steps you through a process in real-time—offering tips, tours and guidance along the way.

A sample of Guided Learning flows follow, check out the Help and Support Panel for a full contextualized list:

- ▶ Personalize the Kinetic Home Page
- ▶ Tour of the Help and Support Panel
- ▶ Tour of the Kinetic Home Page
- ▶ Aged Receivables Report
- ▶ Print Invoice
- ▶ Aged Payables Report
- ▶ ABC Code Maintenance Tracker
- ▶ Allocation Wave Tracker
- ▶ AR Letter of Credit Tracker
- ▶ Cycle Count Tracker
- ▶ Part Advisor
- ▶ Part Transaction History Tracker
- ▶ RMA Tracker
- ▶ Open RMA Report
- ▶ Sales Order On Hold Report
- ▶ Stock Status Report
- ▶ Purchase Advisor

☐ Display Field Level Help

Help and support center

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Epicor Learning Center

Training on Demand

Jump into Epicor Learning Center to review all of the Training on Demand courses. Check out a few of the over 60 new and updated titles below:

- ▶ Exercising Your Training Options for a Stronger Team
- ▶ Taking a Self-Paced (Embedded) Education Course
- ▶ Canceling, Correcting, and Copying Invoice Lines
- ▶ Creating a Credit Memo in AR Invoice Entry
- ▶ Creating a Deposit Billing Invoice
- ▶ Creating a Miscellaneous Invoice
- ▶ Creating an Advanced Billing Invoice
- ▶ Exploring AR Invoice Entry
- ▶ Processing Not Approved and Outdated Labor in Payroll Checks
- ▶ Processing Centralized AR Payments
- ▶ Using Customer and Supplier Netting
- ▶ Setting Up Centralized AR Payments
- ▶ Inspecting Purchase Order Receipts
- ▶ Introduction to Quality Assurance
- ▶ Shipping and Receiving Transfer Orders
- ▶ Using Nonconformance
- ▶ Working with Purchase Order Suggestions
- ▶ Exploring Tasks and Task Sets
- ▶ Creating Subscribers
- ▶ Using Collaborate and Notifications

Embedded Education Courses

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

- ▶ Epicor 10 Delta Education—Tools Management
- ▶ Epicor 10 Delta Education—Financial Management
- ▶ Epicor 10 Delta Education—Manufacturing and Supply Chain Management
- ▶ Accounts Receivable Specialized Course
- ▶ Advanced Epicor Functions
- ▶ Multi-Site Transfer PCID Course
- ▶ Package Control Course

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.