EPICOR

Cloud Business Platform

Business Intelligence and Analytics

Governance, Risk, and Compliance

Cloud Business Platform

Kinetic

Human Capital Management

Financial Management

Customer Relationship Management

Sales Management

Product Management

Project Management

Planning and Scheduling

Supply Chain Management

Production Management

Service and Asset Management

Global Business Management

Human Capital Management

- Core HR
- Global HR
- Candidate Self-Service
- Employee Self-Service
- Talent Management
- Training and Development
- Position Control
- Timesheets

Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Case Management
- Maintenance Management
- Field Service Management

Production Management

- Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Advanced MES
- Quality Assurance
- Quality Management System

Supply Chain Management

- Purchase Management
- Supplier Connect
- Supplier Relationship Management
- Inventory Management
- Advanced Material Management
- Advanced Unit of Measure
- Shipping and Receiving
- Quick Ship
- Warehouse Management
- Supplier EDI and B2B Integration

Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling
- Infinite, Finite, and Constraint-Based Scheduling

Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Financial Planning and Analysis
- Financial Reporting
- Credit Card Payments
- Cash Management
- Credit and Collections
- Asset Management

Customer Relationship Management

- Contact Management
- Marketing Management
- Lead and Opportunity Management
- Case Management
- CRM Mobile
- Integration to Salesforce.com®

Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- EDI/Demand Management-Point of Sale
- Commerce Connect
- Dealer Network Portal

Product Management

- Bill of Materials
- Routings
- Engineering Change and Revision Control
- Document Management
- CAD Integration
- Product Lifecycle Management
- Product Costing
- Product Configuration

Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Advanced Project Management

Governance, Risk, and Compliance

- Corporate Governance
- Risk Management
- Security Management
- Business Process Management
- Global Trade Compliance
- Electronic Reports Engine
- Environmental and Energy Management

Cloud Business Platform

- Mobile, Browser-based Experience
- Virtual Agent
- Collaborate
- Enterprise Search
- Epicor Learning
- Business Process Management
- Enterprise Content Management
- Business Workflow Automation
- IoT and IIoT Applications
- eCommerce Platform
- EDI and B2B Integration
- Electronic Reports Engine
- Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management

Business Intelligence and Analytics

- Operational Reports/Dashboards/IoT/OEE
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Data Warehousing
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence

Global Business Management

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines

Contents

- Improved Employee Experience Drives New Levels of Efficiency
- Innovative Tools Boost Greater Productivity
- Align Greater Fit to Business Needs with Configuration and Integration Technologies
- Pivot Easily to Meet Demands with Flexible Cloud Solutions and Deployment Choice
- Secure Critical Business Systems with Reduced Effort

Kinetic delivers a scalable, cloud solution with a focus on agility so that you can adapt to the changing business climate while doing so with the peace of mind that your critical business systems are secure and ready when you need them. The solution delivers pragmatic innovation on a regular basis to keep your business up to date with the latest industry functionality that keeps you highly competitive. Enable every employee, regardless of tenure or experience with an easy-to-use intuitive cloud-based user experience and embedded learning guides.
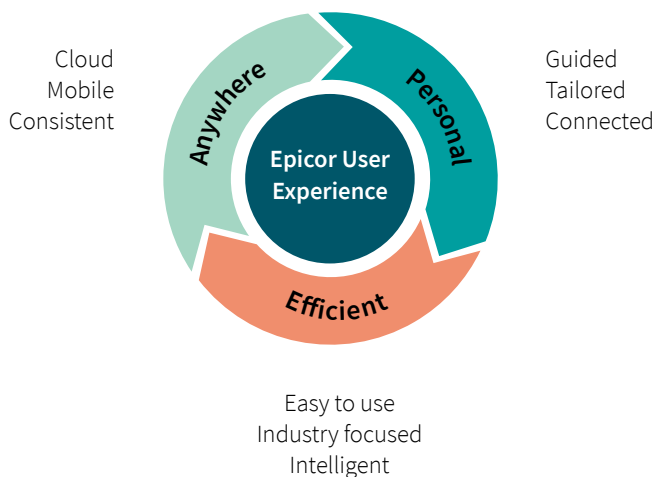
Made with manufacturers, for manufacturers, Kinetic combines deep industry capabilities, great user experiences expected by today's workforce, and innovative technology to help you grow.

The platform technology underpinning the Kinetic application is based on a service-based Microsoft® .Net architecture, optimized on Microsoft SQL® and standardized on Microsoft Azure®. It delivers the latest technology advancements requested by manufacturers including cloud, IoT, and AI/ML. Kinetic delivers a continued partnership in innovation to futureproof your ERP investment.

Businesses can easily evolve their use of Kinetic with business process optimization from our Business Process Management (BPM) and Epicor Functions solutions and use technology such as Kinetic RESTful service APIs to extend to other applications where needed in an upgrade-resilient and secure way. The Epicor Kinetic platform promotes efficiency as it helps our customers to both use and enhance Epicor applications at a business level - rather than a technology level.

The capabilities of the Kinetic Platform include:

- Scalable, service-based architecture
- Mobile, browser-based user experience
- Virtual Agent
- Epicor Learning
- Business Process Management and Epicor Functions
- Integration readiness with RESTful service APIs
- Purpose-built IoT applications
- Application Studio configuration
- Deployment flexibility, cloud or on premises
- Connected people, systems, and processes
- Secure cloud solutions for your business

Cloud
Mobile
Consistent

Guided
Tailored
Connected

Anywhere

Personal

Epicor User Experience

Efficient

Easy to use
Industry focused
Intelligent

Improved Employee Experience Drives New Levels of Efficiency
User Experience

The way we work and interact with technology is constantly evolving to meet the needs of new generations of workers. The challenge for many is attracting this workforce, and worker experience plays a strategic role in this effort. Employees expect a consumer-grade experience at work with modern and intuitive applications that boost productivity and simplify everyday tasks. Cloud mobility is also a key aspect. No matter if they are working from home or walking through the shop floor, workers need to have access to their applications through the device and browser of their choice.

Evolve your business technology to meet the needs of todays workers.

Kinetic offers a mobile, browser-based user experience that enables employees to complete tasks in less time while optimizing their personal workflows.

The Kinetic users experience delivers a user experience that is:

- Made for use anywhere, browser-based in the cloud, on any device with a consistent experience

- Made for personal use with guided workflow, easy tailoring, and the ability to connect digitally

- Made for efficiency and greater productivity with a simple, easy to use interface that offers industry-focused features and leverages cognitive technologies for greater automation

Personalization

Create your own experience to maximize productivity. Simplify your job with quick optimizations to the personal workflow in the screens you use every day. Configure grids, hide/show UI fields, or collapse/expand panel cards depending on your needs.

Epicor Virtual Agent (EVA)

Epicor Virtual Agent is an artificial intelligence (AI) powered tool that provides you access to your Epicor system. Users across the enterprise will be empowered by the context-aware, natural language processing of EVA that allows them to converse with the app through text or speech on their Android® or iOS® mobile devices. EVA is also available on the desktop in Collaborate. EVA is powered in part by Microsoft Azure AI services—a 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 solves problems today and lays a strong foundation for intelligent technologies that integrate with their Epicor system. 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 or supplier information. EVA initiates actions based on this information—including creating a simple purchase order or 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.
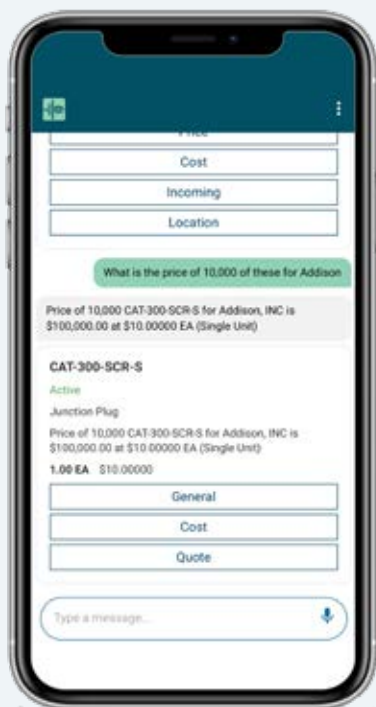
Talk to EVA for queries and actions in Kinetic

Collaboration

Meaningful relationships exist across your company and are a great resource for serving customers and improving efficiency. When workers engage with each other to solve problems and innovate processes, your business benefits and strengthens. By integrating unstructured meetings and conversations with your critical business Kinetic data and by enabling employee conversations digitally, you can help eliminate working silos, giving your business a competitive advantage.

Collaborate is an enterprise-wide collaboration and productivity tool built on the cloud. It's easy to use with hashtags and mentions, connecting groups of workers simply.

Easily accessible across Kinetic, Collaborate shifts works from monitoring analytical dashboards and report to being actively engaged with instant notifications from Kinetic process and events. Collaborate message streams collect and communicate these messages across the enterprise. Outlier processes that often bury users in meetings or emails are easily mainstreamed with the flexibility and simplicity of Collaborate.

Collaborate has key integrations that drive worker productivity including:

- Microsoft Teams®: integration enables teams with external players to connect on project details by Sharing Collaborate messages

- IoT: Notification of adverse events in Kinetic or directly from your equipment through IoT, drives new levels of responsiveness and productivity.

- Epicor Virtual Agent (EVA): Integrates to EVA, delivers on the simplicity through natural language to answer questions of Kinetic.

- Data Discovery: Offers users the ability to share Data Discovery metrics through Collaborate.

- File Sharing: Easily share files digitally with Collaborate

Enterprise Search

Enterprise Search brings the Internet search experience to Kinetic. Enterprise Search provides embedded search capabilities through tag clouds of Epicor structured data that span all Epicor applications built upon it, and it can also extend beyond enterprise data to unstructured data like Word documents-all in a secure manner.

Complete functionality includes:

- Secure search results
- User-definable searching
- Easily find relevant busines data
- Data drill-down capability
- Complete search results in a browser
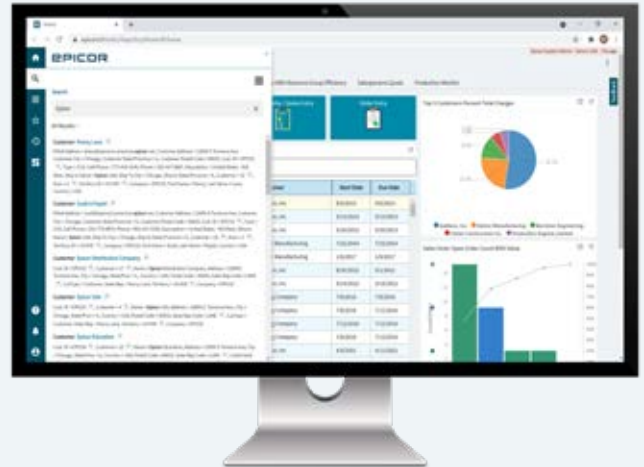
Innovate processes with strong collaborative tools that connect workers and teams.

Workbench and Tracker Views

Workbenches and Trackers provide a focused, paperless, and single point for entry and review. Workbenches can automate and execute routine processes, while Trackers provide contextual information throughout the system to users with "view only" access. Designed with robust search, Trackers allow users to move easily between views— quickly getting to a 360 degree view of the customer, supplier, or part. Nearly every function is available for view. Epicor comes with many predefined workbenches— including purchasing, planning, engineering, inspection, service, sales, credit manager, and plant workbenches.

Information Worker

According to current industry surveys, desktop productivity tools are used by 95 percent of business workers, with Microsoft Office as the standard for desktop applications. Epicor Information Worker provides a secure, seamless interface to your Epicor application from within Microsoft Outlook®, Excel®, or Word—blurring the lines between enterprise software and desktop productivity software to create a single, immersive solution. The underlying architecture behind Information Worker provides direct access to updatable Business Activity Queries (BAQs).

Flexible, Curated Learning Pathways

Build Your Foundation → **Stay Productive** → **Extend Your Knowledge**

Set learning paths
Chart your courses and pathways

Watch and learn
Introductory videos

Fast solutions
Short videos and FAQs

Guided learning
'How to' walk throughs while you work

Advancing skills
Master courses and test your knowledge

Get hands-on
Practice and reinforce skills

Intuitive help
Active suggestions, tips and resources as you need them

Further reading
Articles and technical guides

Learning accelerates adoption, develops skills and builds confidence for users.

Epicor Learning

At Epicor Learning we know that skill development leads to deeper product adoption and enhances the value that customers get from our solutions. We want the broadest possible audience to benefit from our training. That's why we focus on flexibility; offering multiple ways to access learning and a variety of learning methods grouped by what a learner is looking to do. Whether you're looking to build your foundation, stay productive or extend your knowledge, skills can be acquired anytime, anywhere and in any way you choose.

Epicor Learning is a complete training experience, a mapped and planned program that includes hands-on Exercises and so much more. The Epicor Learning License, will five you full access to Epicor Learning Center with a deep catalog of video-based courses and Hands-On exercises, role-based learning paths, and the tools to quickly manage their entire training program. Think of this as a curated, but highly flexible program.

Hands-on courses can be accessed individually, but they are also integrated into our Epicor Learning Center (ELC) role-based agendas, providing a more blended, immersive learning experience where people can first WATCH, and then DO. Hands-On Exercises are launched directly from ELC, so they can be assigned and tracked. And as part of the Epicor Learning experience, they are

built strategically to work with and support the video content. This centralizes the whole learning experience and organizes our training into definitive learning paths that take you from new user to expert.

Help and Support

The Help and Support Panel, embedded on Home Page, provides single search access to online help articles, videos, and Guided Learning. It eliminates the need to manage multiple platforms, as you can easily access 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 system. You can also enable Field Help from the Help and Support Panel. When you have a question about an application you can easily find the answer without leaving the system. Simply click the question marks next to fields to open a Field Help panel on the right that displays technical details. This is a great tool for onboarding users.

Guided Learning is based on the concept of learn-as-you-go, taking you through a complete process in real-time life in Kinetic. It provides product, form, and feature tours, as well as in-app communications. Experience a seamless and intuitive onboarding and training process.

Innovative Tools Boost Greater Productivity

Business Process Management

Building on and extending beyond the simple rules enforced by Business Activity Management (BAM), Epicor Business Process Management (BPM) is all about identifying and improving processes to make your business more efficient, disciplined, and better able to adapt to change.

Epicor incorporates BPM technology to enable organizations to automate and streamline business processes for continuous improvement. Epicor BPM augments your current efforts of continuous improvement by allowing you to more closely tailor your Epicor solution to reflect the best practices you have developed.

BPM is integrated across the toolset to enable easier deployment of key integrations and business processes in your ERP. For example, BPM works with Collaborate as a notification engine of events, with Epicor Functions to invoke standard processes and facilitate more elegant integrations, and Service Connect for execution of workflow.

Complete functionality includes:

- Seamless integration and workflow capabilities
- Easy-to-use designer with wizard interface
- Pre-process condition builder
- Post-process routine automation

Change Data Capture

Change Data Capture (CDC) is solution that allows you to synchronize information in real-time between Kinetic and other systems and applications. It identifies and captures data that you create, update, and delete from Epicor and makes this change data available for use by different applications. A use case for this solutions includes Collaborate where 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, Collaborate lets users create custom notification rules. This is achieved with the Change Data Capture (CDC) management solution.

Task Management Workflow

The Epicor Task Management system allows you to connect your people with processes and the ERP system itself. As business processes become more complex and dynamic, it's important for any enterprise application to recognize situations and help drive people toward the right efforts and the right decisions. Task Management workflow is available in key areas of the system including CRM, Engineering, Case Management, and Maintenance Management.

Applications for IoT

Kinetic offers multiple solutions, on the plant floor or the wider business, to leverage data collected from equipment and systems for ongoing monitoring, action or wider analysis.

Epicor IoT

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

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

Advanced MES

Advanced MES is an edge solution that collects IoT, Industry 4.0 data to drive greater production efficiency on the plant floor. It extends your Epicor system to deliver automatic production monitoring and process monitoring, empowering manufacturers with production data and the ability to eliminate inaccurate and time-consuming manual data collection; so operators can stop measuring and monitoring, and focus on making quality products.

You can achieve informed lights out manufacturing, and get the powerful metrics you need to improve performance–Overall Equipment Effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate machine-related data, along with operator depth and dimension helps you pinpoint critical issues, reduce waste, and improve quality and customer service.

Service Pro

Service Pro delivers an IoT-Connected Field Service Solution for Manufacturers. Manufacturers desire to consistently provide a great service experience for their customers, especially when the equipment, machinery or other product is mission critical, and needs rapid repair or ongoing maintenance. Collecting IoT-driven machine health and maintenance data is only the start. Translating that data into proactive, preventive field service actions can mean the difference between customer uptime and downtime. Join your IoT asset to Service Pro for end to end field service, from sale and in-service date, to preventive maintenance, inspection and repair activities.

## Robust Business Monitoring, Reporting, and Analytics Solutions, AI/ML

Epicor delivers a strong portfolio for monitoring, reporting on and analyzing your business data. Enabling users with self-service tools helps ensure critical events and trends are acted on quickly and business results are optimized. Solutions that start with key business metrics for manufacturers reduces the time and effort in building business-specific metrics and shortens the time for deploying and ROI for your ERP solution. Refer to the "Business Intelligence and Analytics" chapter for a complete picture.

Below is an overview of the portfolio available with Kinetic.

- Business Activity Query with over 800 "out of the box" views
- Data Discovery
- Epicor Data Analytics (EDA)
- EDA Content Packs for Sales, Production/Project Management, Materials, Financials, Field Service, Maintenance Management, and Advanced MES
- EDA modules for Financial Statements, Budgeting and Forecasting
- Epicor Financial Planner
- Spreadsheet Server
- Epicor ECM (Enterprise Content Management)
- Epicor Forms and Reports
- SSRS Reporting
- Advanced Print Routing
- Auto Print Control
- Bartender Label Printing

Advanced Print Routing

Your customers, suppliers, and internal users all have different reporting and document requirements. Some may need documents e-mailed as an attachment or deposited into a designated folder for FTP delivery. Others may still need printed copies. Information needs vary from customer to supplier, as well as between internal roles. Advanced Print Routing is built right into Kinetic to provide important business documents and reports to the right people at the right time with the right information. Easy-to-use tools quickly create, route, and format your reports and commercial documents. You can send order confirmations or invoices to customers, generate and submit required financial reports, and deliver parts reports or pick-lists to your operations personnel. With Advanced Print Routing, your organization can reduce reporting errors, improve customer satisfaction, and eliminate the hassle of supporting additional applications.
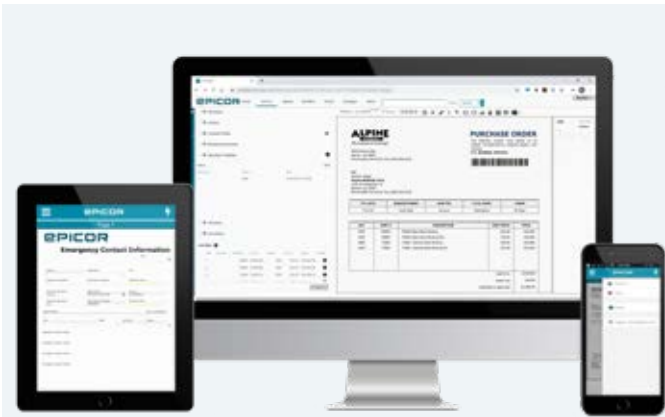
Enterprise Content Management leverages smartphones and tablets for access anytime, anywhere.

Enterprise Content Management

Enterprise Content Management (Epicor ECM) combines with a deep integration to Kinetic to form APR Enhanced, the next level above Advanced Print Routing. It transforms your paper-based system into a fully digitized repository with document repository links in Kinetic that eliminate the waste and double-handling associated with paper and poorly maintained online folders. The central and secure document repository and optional business automation workflows for document approvals integrated to Kinetic help manufacturers achieve ISO 9001 and other certifications. Epicor ECM is configurable for your company's needs, and while customers traditionally have started with the AP Automation module, many manufacturers are just as interested in applying the solution to other departments, such as in packaging and shipping, where the ECM PackageWorks module enables high-speed, automatic selection of the

appropriate quality document packages unique to each customer's order and is highly valued for the huge savings in time and resources.

Complete functionality includes:

- Drag-and-drop attachments in Kinetic
- Document repository
- Industry-unique ValiDate security
- Contextual retrieval
- Document retention policies
- Multiformat document viewing
- Web browser interface
- Mobile apps

Optional functionality includes:

- AP Automation (refer to "Financial Management" chapter for more information)
- Sales Order Automation (refer to "Sales Management" chapter for more information)
- PackageWorks for document package workflows
- Intelligent Data Capture
- Electronic Forms
- Connector for DocuSign® eSignature
- Customizable Workflow module

Intelligent Data Capture

The first step in most Epicor ECM workflows, Intelligent Data Capture (Epicor IDC) eliminates labor-intensive, error-prone, and time-consuming manual document processing. Easy to use and configure, Epicor IDC is integrated with Epicor ECM to simplify data capture for content management and business process automation. Its artificial intelligence and machine learning provides automatic self-learning for fast set-up of previously unseen invoices with no templates or programming necessary.

Epicor IDC starts with capturing documents from emails, network watch folders, fax, multi-function-devices or via direct API connection. Next its classification engine uses AI machine learning to look at the document in much the same way a human would, asking: Is it a an invoice? A purchase order? A credit memo? It looks at physical attributes, such as lines, grids, fonts, and barcodes, and it looks for key words and phrases using a machine learning algorithm for natural language processing. It also determines where one document stops and another starts, and any attachments associated with a document. Lastly, Epicor IDC uses unassisted machine learning with no prior setup to extract the required header, footer, and line-item data fields to send on through to Epicor ECM.

Epicor Commerce Connect is always a click away for a great customer experience and additional revenue potential.

eCommerce Platform

Businesses looking to improve customer service, reduce lead times through new business efficiency, and deliver new opportunities to sales will often invest in eCommerce solutions. Epicor Commerce Connect (ECC) was designed to solve the challenges of manufacturers and their unique needs as they integrate an eCommerce solution. ECC is built on the Magento platform—a leader in eCommerce—with a comprehensive ecosystem and tooling in constant development to enable businesses to stay current with latest commerce trends. Epicor Commerce Connect is also fully integrated with Kinetic and offers the synchronization required by most commerce sites while boasting additional capabilities needed by manufacturers—including full integration with Kinetic product configuration capabilities. Finally, ECC easily extends to new data elements and provides a platform for eCommerce business growth.

While many companies can provide eCommerce services, very few leading providers are able to deliver the value and rapid results that Epicor Commerce Connect affords. It can extend business boundaries with a proven commerce architecture that connects businesses to consumers, customers, and suppliers—and enables Kinetic customers to utilize their websites to help drive revenue, increase customer satisfaction, and grow their businesses.

EDI and B2B Integration

Supply chains require flexibility and resilience now more than ever. When your company transacts business electronically, prospects and customers can pivot to you quickly. You also have similar benefits when transacting with your upstream suppliers—in fact, Epicor EDI (formerly called 1 EDI Source) can connect any supplier to you even if they don't have an EDI/B2B solution themselves. No matter whether you need traditional EDI or other B2B formats such as JSON, XML, REST API, and connections to eCommerce marketplaces, Epicor EDI with its 30 years of innovation has you covered. 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.

Base functionality is contained in the Epicor EDI [HQ} HeadQuarters™ module, the industry-leading EDI and B2B mapping and translation solution that allows full control of EDI operations.

Complete HeadQuarters funtionality includes:

- Highly performant JSON API endpoints built exclusively for integration to Kinetic

- Support for ANSI X12 and UN EDIFACT EDI standards

- Modern, easy-to-use interface

- "One-click" trading partner setup

- Scalability

Optional functionality includes:

- EDI/Demand Management – a Kinetic module (refer to the "Sales Management" chapter for more information)

- Supplier Digital-Integration Suite (refer to the "Supply Chain Management" chapter for more information)

- [HQX] HQXchange – Bundled EDI and business visibility

- [IX] IntelligentXchange - Visibility and analytics tool for translating EDI data

- [MX] ManagedXchange – Fully managed EDI utilizing [HQX] software

- [AS2] AS2 Complete – AS2-compliant for secure data transport, encryption, and certificates management

- eCommerce marketplace connectors
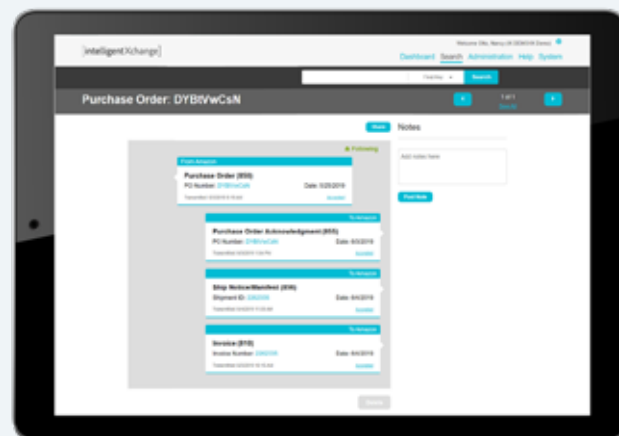
View B2B transactions in easy-to-understand text message format instead of "EDI speak"

Electronic Reports Engine

If your business needs to generate an electronic report from the Kinetic ERP system, the Epicor Electronic Reports module is a great solution that allows experts to deliver data report files in diverse formats such as XML, JSON, PDF and more. Electronic Reports features the user-friendly query editor solution in Kinetic, the Business Activity Query (BAQ) designer that every user has access to and which allows any user to create data queries easily with filters, conditions and summaries. The data source can be used in any area of the Kinetic solutions, but this module is mostly used for financial data reporting such as GL transactions, Chart of Accounts, balances, electronic VAT reports, invoice transactions.

Demand-Side Documents	Supply-Side Documents
• (ORDERS, 850) Purchase Order – Inbound • (ORDRSP, 855) Purchase Order Ack. – Outbound • (INVOIC, 810) Invoice – Outbound • (DESADV, 856) Adv. Shipping Notice – Outbound • (DELFOR, 830) Planning Schedule – Inbound • (DELJIT, 862) Shipping Schedule – Inbound	• (ORDERS, 850) Purchase Order – Outbound • (INVOIC, 810) Invoice – Inbound • (DESADV, 856) Adv. Shipping Notice – Inbound • (DELFOR, 830) Planning Schedule – Outbound • (DELJIT, 862) Shipping Schedule – Inbound

Built-in Epicor EDI API endpoints support these documents for Kinetic.

Third party organizations often require financial data in electronic format, such as customers, suppliers, auditing firms, analysts, advisory companies, banks, investors, or authorities. Publicly traded companies are obliged to file their financial statements, quarterly reports and many forms to the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system used at the U.S. Securities and Exchange Commission (SEC). Electronic Reports also support electronic invoicing and digital signature solutions. The Epicor Country Specific Functionality (CSF) packages also use this module to provide digital report files required by local legislations across the globe. Epicor Electronic Reports helps your company do business globally. Refer to the "Financial Management" chapter for more information on this solution.

Align Greater Fit to Business Needs with Configuration and Integration Technologies

Application Studio Configuration

We understand one size doesn't fit all. Epicor offers the flexibility you need to easily configure the system to meet your unique industry and business requirements. For businesses, Application Studio takes a best practice approach to system configuration. It takes out the complexity of changing code, as configuration is done in a low/no code environment. Protect your investment by staying current with the latest releases as the configurations done with Application Studio are easier to upgrade, secure, and cloud friendly.

Application Studio tools offer an easier and faster way to create your own experience. Configure screens, fields, row rules, events, page layouts, and more through a visual designer and drag and drop functionality to add components—all done in a low/no code environment.

Easily access your existing configurations through a published menu, load into the editor and preview your configurations before deploying them to other users to make sure you achieved the desired outcome. Also, you will have fast access to education resources from the application to get you started in no time, with specific training around the different elements and use cases.

- Cloud friendly
- Epicor Functions
- BPM integration
- Low code/no code configurations
- Upgrade resilience
- Design environment
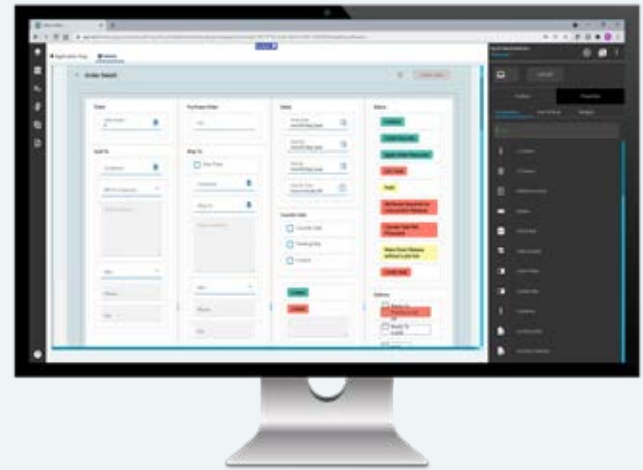
No code/low code configurations provide flexible solutions to help you stay ahead.

Epicor Functions

Epicor Functions sit alongside BPMs. When you create functions, you set up your own unique ERP method. Both internal and external sources can then call this function to execute Kinetic processes (services). For example, a function can be called internally to look up a phone number or called externally from an outside program that attaches documents to part records. To maximize reusability and efficiency for developers, an Epicor Functions library is built over time to reuse these Functions—eliminating the need to copy and paste this logic to multiple BPM directives. Additional advanced use cases for leveraging Epicor Functions includes building a standard set of fields that could be fed into the function from an outside system such as an eCommerce site or EDI transaction.

Business Activity Query Views (Updatable)

Create a custom view of your Kinetic data using a complete toolset. Business Activity Business Activity Query (BAQ) views can be built to be updatable. Users can generate any table of business data and make it updatable to quickly update key fields. This capability is often leveraged in updatable dashboards, Application Studio configurations, and as this is exposed as a REST service, integrations to 3rd party applications.

REST Services

Representational state transfer (REST) services are a type of web service based on the architecture of the internet. Through this application program interface (API), these services link applications more easily through Internet type connections.

Everything in the system (both the backend processes and the user experience) is available through REST Services. The entire Kinetic application offers REST Service open APIs and to simplify the use, Kinetic is also OData compliant.

What you can accomplish with the Kinetic open APIs include:

- Anything the user interface (UI) can do, you can do with our Open APIs

- You can create your own custom applications and connect with Kinetic

- You can integrate data into other business systems and applications

- Epicor Functions let you create your own RESTful services that you can use anywhere, especially custom logic for whatever you want

- BAQs let you create custom views that you can use anywhere in the system

- Integration with external systems with API keys and added security

Epicor Integration Cloud powered by Jitterbit

The Epicor Integration Cloud is the platform of choice for business system integration to allow customers to meet their specific business needs with extensible integration. Beyond the standard integration to Salesforce, it is possible to create additional integration mappings of standard objects. Custom fields can also be included in synchronizations and automation using the Jitterbit Harmony studio in the EIC Platform. This can be done at any time—either during an initial project or in a subsequent phase by the Epicor Integration team or self-service by the customer. The Epicor Integration Cloud includes self-packed training that allows an IT resource to come up to speed on building integrations to different end points, amending an existing integration, monitoring transactions, and keeping pace with evolving APIs.

Epicor Service Connect

Epicor Service Connect is an edge technology that is a powerful business integration platform—functioning as a central integration point for secure workflow orchestrations within Epicor applications, as well as external connectivity to Epicor and non-Epicor applications. Because Epicor Solutions are built using Epicor APIs the power of Service Connect can be used to streamline processing within the application framework.

Pivot Easily to Meet Demands with Flexible Cloud Solutions and Deployment Choice

Leadership in global cloud ERP is in the DNA of Epicor and meeting the changing needs of your business with flexible cloud solutions delivers on business growth today and into the future - wherever that growth takes you. Kinetic is cloud ERP with deployment choice of public cloud, on premises, or hybrid cloud. Hybrid cloud allows businesses to step into the cloud with extensions without running their entire ERP in the cloud. As the solution offered uses the same technology, regardless of cloud or on premises, businesses can also choose to self-host the solution or work with a 3rd party. Multinational organizations benefit from additional flexibility as distributed business units have deployment choices across the enterprise with some sites choosing cloud and others choosing on premises deployment. The latter because of the region or remote geography challenges for cloud.

To fully meet the needs of our customers, Epicor delivers a complete portfolio of cloud service offerings designed to reduce the complexity of choosing cloud for your business. Whether you are new to Epicor or an existing customer, looking to migrate to the cloud, Epicor delivers a complete offering designed to simplify your experience to cloud including:

- Microsoft Azure public cloud with its rich cloud infrastructure and services

- Separation of the application infrastructure from the database layer, providing additional security and control over your cloud environment

- Industry cloud expertise where solutions unique to your industry are available such as the Validation Bundle for Life Sciences and Azure Government Cloud

- Cloud upgrades twice a year with innovative new functionality, and minor security updates every month to keep your business information protected

- Antimalware, redundant backups and disaster recovery in-region for business continuity and resiliency

- 99.98% historical global uptime—we run Epicor solutions on world-class Azure datacenters in all major regions worldwide, and you can view our uptime anytime online at https://status.epicor.com/#!/

- A partner ecosystem certified for industry cloud and enabled with tooling to help ensure the success of your implementation

Additional Pilot or Test Environments

Optionally choose to extend your cloud solution with an additional environment for testing or development of extensions without impacting your production cloud environment.

Upgrade Flex

Business demands may require additional time before transitioning to the new cloud upgrade. Optionally defer or "flex" the upgrade up to 90 days with the Flex option.

Cloud Production Environment Copy

Technology leaders and system administrators drive significant value by expertly leveraging ERP data to better understand the business, drive efficiencies, and identify growth opportunities. Access your data with a read-only copy of your production environment with ODBC or Azure Data Studio for data queries or integrations to third-party solutions such as Microsoft Power BI®.

Multi-region Multi-company Cloud Transactions

Kinetic offers 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 Kinetic 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 gain a consolidated view of multi-company transactions without needing all to run out of a single Kinetic 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.

Validation Bundle for Life Sciences

The availability of critical business systems in the cloud improves your ability to compete. Cloud enables both business agility and the increased speed at which technology is delivered to better meet business needs for innovation. Additionally, the Kinetic Cloud Validation Bundle for Life Sciences offers a cloud solution designed to reduce the risk of compliance with support for the software validation needs of FDA-regulated businesses. The solution couples regulatory documentation with an upgrade cadence designed for Life Sciences and the need to meet FDA requirements.

U.S. Government Cloud for Aerospace & Defense

Select the U.S. Goverment Cloud solution for compliance with ITAR and CMMC regulations. In addition to running your Kinetic solution in the Microsoft Azure U.S. Government Cloud datacenter, Epicor assigns US nationals to support your environment and infrastructure to help ensure compliance.

Secure Critical Business Systems with Reduced Effort

Protecting your business from cyberattacks and natural disasters gets increasingly complicated as technology gets more sophisticated, attacks are more difficult to detect, disasters are more widespread, and the growing importance of data means the stakes are only getting higher. The question that we're all now realizing we have to answer is not, if it happens, but when it does, do I have the right protection in place to keep my business safe? Kinetic helps you answer this critical strategic question with important safeguards like data backups, authentication services, managed firewalls, and antivirus. With Kinetic, create layers of protection that reduces risk to your business, including:

- Multi-factor authentication
- Disaster recovery in region
- Daily backups retained for 30 days
- 24x7 security monitoring
- Periodic tests and audits to help ensure reliability

Epicor Security Suite for Hybrid and On Premises Deployments

Securing internal systems, including networks and workstations, from security threats can be an expensive and complex initiative for most businesses. The Epicor Security Suite is designed to reduce this cost and complexity and provide the peace of mind that your systems will be ready when you need them. Epicor Security Suite includes key components that provide state-of-the art, comprehensive cybersecurity protection including:

- Next-generation endpoint production powered by SentinelOne
- Firewall appliances by SonicWall
- Secure data backup services

Application level security

The Kinetic comprehensive security features secure access to multiple companies without having to close all forms or carry out different logins when switching companies. Plus, Epicor provides options for user authentication services with Epicor Identity Provider or Microsoft Azure Active Directory for single sign on (SSO), multi-factor authentication (MFA), and standardized password policies, as well as method security protocols to secure types of processing users are able to carry out— like allowing a user to update an existing part but not add a new part—by user or group.

Complete Security features also include:

- Data level security
- Security reporting
- Online edits and audits
- Date and time—using server time—and user name for auditing
- Product security
- Application security
- Access security
- Business security
- Change logs
- Complete audit control
- HTTPS protocols
- Support for Microsoft SQL Server Transparent Data Encryption (TDE)
- Data Masking
- Multifactor Authentication

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Gold Partner

Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers. 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.

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