

Release 2021.2 of Kinetic 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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In the 2021 Gartner® Digital Worker Experience Survey, 80% of respondents working in the manufacturing industry agreed with the statements

“Digital technology is essential — I could not get any of my job done without it.”[1]

and

“By 2024, organizations providing a total experience will outperform competitors by 25% in satisfaction metrics for both CX and EX.”[2]

Source: [1] Gartner Top 5 Strategic Business Trends in Manufacturing Industries for 2021 -, Michelle Duerst, et al, Published 4 June 2021 GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission





Source:[2] Gartner Top 5 Strategic Business Trends in Manufacturing Industries for 2021, Michelle Duerst, et al Published 4 June 2021

Executive Overview

Digital transformation quickly skyrocketed from a nice to have to a need to have to compete and thrive in today’s business climate. This isn’t unique to manufacturing. Recently, a study by Gartner found that 80% of those surveyed responded that “Digital technology is essential – I could not get any of my job done without it.”[1] The good news is that as a use of Kinetic (or Epicor ERP), your business is already digital. But how are you connecting with your valued customers – what experience are they getting from your business and how could you improve the digital experience for them to improve satisfaction. “By 2024, organizations providing a total experience will outperform competitors by 25% in satisfaction metrics for both CX (Customer Experience) and EX (Employee Experience).” [2]. An opportunity awaits. To help with your digital transformation journey, the latest release of Kinetic delivers the Epicor Configure Price Quote (CPQ) solution, a visual 2D/3D configurator that can sit on your website and deliver an industry-leading experience for your customers. This is just one piece of this exciting release, there are many more capabilities to explore.

Our focus for this release includes our ability to enable your cloud acceleration, empower your users to be more productive, drive greater business insights and automation, strengthen industry depth to better meet your needs, and improve your global readiness for expansion when it makes sense to be closer to your customers.

Kinetic 2021.2 Release Highlights

 Cloud Acceleration	 Empowering Users	 Business Insight and Automation	 Industry Depth	 Global Expansion
<ul style="list-style-type: none"> + Public Cloud Offering for Enterprise + Identity for MFA and SSO + Collaborate enhancements + EFP Machine Learning & Australia Datacenter + Security Suite – Cellular ISP Failover 	<ul style="list-style-type: none"> + UX Transformation + Application Studio Imp. + Epicor Learning + Epicor Virtual Agent (EVA) Improvements + Industry Nomenclature 	<ul style="list-style-type: none"> + Advanced MES Digital Twin by Sage Clarity + Advanced MES Analytics with EDA + Amazon & eBay Connectors with EDI 	<ul style="list-style-type: none"> + Epicor CPQ + ECC 2.13 Visual CPQ + <u>StructuraFAB</u> + Advanced UOM Imp. + ECM Mobile 2021.2 + Pro File (PDM/PLM) + Quick Ship 2021.2 + Advanced MES 8.3.4 	<ul style="list-style-type: none"> + Ongoing CSF Updates + Mass Project Revenue Recognition + Financial Reporting

Upgrading to release 2021.2 of Kinetic helps secure your digital transformation and 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, 2021.2 without help. The Epicor Services and Support organization is ready to assist with your upgrade. Start the process by contacting your customer account manager.

Availability Matrix

This briefing may discuss features that may have not been released yet. The delivery date for general availability of 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 Kinetic 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. Each feature in the table below shows the projected date of planned availability.

Feature	ERP deployment availability	Planned availability	Generally available
Browser-Based User Experience	Cloud, On premises	October 28, 2021	October 28, 2021
Application Studio	Cloud, On premises	October 28, 2021	October 28, 2021
UX Adoption at Your Own Pace	Cloud, On premises	October 28, 2021	October 28, 2021
Collaborate	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor Virtual Agent 2021.1	Cloud, On premises	July 13, 2021	July 13, 2021
Epicor ECM (DocStar) 21.2	Cloud, On premises	October 20, 2021	October 20, 2021
Epicor ECM 21.2 Simplified Chinese Translation	Cloud, On premises	November 17, 2021	
Enterprise Cloud	Cloud	November 17, 2021	
Epicor Security Suite: New Cellular ISP Failover Offering	Cloud, On premises	October 28, 2021	October 28, 2021
Identity	Cloud	October 28, 2021	October 28, 2021
Epicor CPQ (Configure, Price, Quote)	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor Commerce Connect 2.13	Cloud, On premises	October 28, 2021	October 28, 2021
SecturaFAB	Cloud, On premises	October 28, 2021	October 28, 2021
Country of Origin by Lots	Cloud, On premises	October 28, 2021	October 28, 2021
Advanced Unit of Measure Enhancements	Cloud, On Premises	October 28, 2021	October 28, 2021
Quick Ship 2021.2	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor EDI (1 EDI Source) Integration	Cloud, On premises	May, 2021	May 2021
Kinetic Project Management	Cloud, On premises	October 28, 2021	October 28, 2021
Advanced Project Management Enhancements	Cloud, On premises	October 28, 2021	October 28, 2021
Multi-bins for Planning Contracts	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor Advanced MES 8.3.4	Cloud, On premises	October 28, 2021	October 28, 2021
PRO.FILE (PLM/PDM)	Cloud, On premises	October 28, 2021	October 28, 2021
Spreadsheet Server	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor Data Analytics (EDA)	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor Financial Planner (EFP)	Cloud, On premises	October 28, 2021	October 28, 2021
Epicor Cash Collect	Cloud, On premises	August 31, 2021	August 31, 2021
Inactivate Customers, Ship Vias, and Part Classes	Cloud, On premises	October 28, 2021	October 28, 2021
Improvements to Existing CSFs	Cloud, On premises	October 28, 2021	October 28, 2021

General

Browser-Based User Experience

Epicor’s browser-based user experience is here to simplify your daily tasks and make your job more delightful. We continue making progress on the user experience transformation. This release includes more than 70 new forms across different roles. You can review the complete list of forms that have been converted to the new UX on the [Kinetic UX Application Release List](#).

We are introducing new functionality and enhancements to the user experience driven by the valuable customer feedback we have received:

New Functionality	General User Experience Enhancements
Grid Features <ul style="list-style-type: none">• Landing page filters and default settings• Sort and filter on progressively loaded grids (click header, it will resort the grid data)• Enable copy & paste without going through Excel (in text fields)• Lock column moved to Personalization	General Enhancements <ul style="list-style-type: none">• Application menu browsing experience• CTRL + Click opens form in new browser tab• Auto publish/subscribe between application tabs/windows when form is launched using Open With• Resizable navigation and BoM Tree
Hot Keys <ul style="list-style-type: none">• Enable Save hotkey on all forms• Add Next/Previous record shortcuts (CTRL + Arrow Left – next record, CTRL + Arrow Right – previous record)• F1 to open Help and Support Panel	Personalization <ul style="list-style-type: none">• Display field descriptions in personalization with Tool Tip for database details
Attachments <ul style="list-style-type: none">• Attachments can be opened and viewed in ECM from the attachments panel in Kinetic	Epicor Ideas <ul style="list-style-type: none">• Add an "On Menu" column to the Upgrade Configuration Dashboard, All Dashboards tab

With Kinetic 2021.2, **Epicor Learning** continues to evolve and drive both required foundational skill-building as well as delivering fast answers from within your Epicor solution. Customers with an Epicor Learning License have full access to the Epicor Learning Center (ELC). This website has a deep catalog of video-based courses, hands-on exercises, role-based learning paths, and other tools that help customers manage their entire training program.

Epicor Learning Center courses, agendas, and roles have been updated to reflect the Kinetic experience, allowing customers to quickly align the right content to each user! Customers can watch the Assigning Kinetic Content Using Roles course for tips on using ELC to drive training.

Epicor’s Hands-On course list continues to grow, with over 50 courses available with release 2021.2. These popular courses can be accessed individually, but we recommend using the agendas and roles for the full blended, immersive experience where you can first WATCH, and then DO. Unlike the Embedded Education Courses for the

Classic user experience, the Hands-On Courses launch directly from the ELC, so customers can assign them to learners and track their outcomes.

We also continue enhancing the Help and Support panel in the ELC. All guided learning lessons have been updated to 2021.2 with new lessons added weekly.

Application Studio

Application Studio offers a best practice approach to configure the system. It takes out the complexity of changing code, as the configuration is done in a low/no-code environment.

Application Studio provides an easier and faster way to create your own experience. With Application Studio you can configure screens, fields, row rules, events, page layouts, and more. 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.

With 2021.2, we are including new features and enhancements:

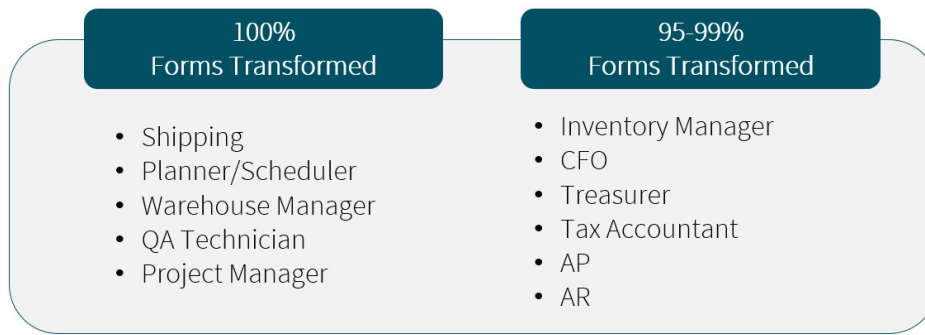
- ▶ **Problems Panel:** New problems panel provides contextual warnings and errors as you work on your layer. A set of warnings will expand over time to help guide you as you build your layer as you go.
- ▶ **Before/After Events:** New type of event can be set to run before or after any other event which on the upgrade will not require any merging and is much more likely to just keep working as-is.
- ▶ **Application Studio Previewer:** Open preview in a new browser or window.
- ▶ **Improved Cut/Copy/Paste:** Fixed limitations copying and pasting elements between different pages and added cut/copy/paste behaviors into the event designer to quickly clone and move parts of event logic from place to place.
- ▶ **Event Designer Drill Down:** Directly drill from one event to another that it calls. A simple feature that makes working with events way easier and simpler to reason about.
- ▶ **Shortcuts for moving controls:** Re-introduced quick keyboard shortcuts for moving controls into their container.
- ▶ **User Experience Refresh:** Cleaned up minor aesthetic and experience issues such as hard-to-read blue text, inconsistent behaviors, and layout between screens.

UX Adoption at Your Own Pace

We understand that change doesn't happen overnight. That is why you can choose to adopt the new user experience at your own pace, minimizing business disruption.

We continue promoting a phased approach to adopt the new user experience. If you are not yet familiar with the new user experience, we recommend you start by using the Kinetic Home Page. Take advantage of having the right information and quick access from the main menu that includes training resources under the Help & Support panel that offers contextual education resources like articles, knowledge on-demand videos, and guided learning.

You can start deploying the new user experience to small groups. The forms included in the following personas are completely transformed or very close to, so you can run your workflow end-to-end in the new UX.



Classic UI Lifecycle Policy

To assist with change management and ease your transition to the new experience, **you can still use the classic user interface (UI) in Kinetic 2021.2.** But starting with the 2021.1 release, we stated that enhancements to the classic UI will no longer be available going forward, we'll just provide critical and compliance updates. Going forward, new functionality will only be added to the new browser-based Kinetic UI.

Critical and compliance updates for the heritage UI for Epicor ERP will be available for 2 years from the release of 2021.1. After this time, the classic UI will be available in the software but not updated.

After 3 years from the release of 2021.1, the Classic UI, and the Classic and Modern Shells will be removed from the Kinetic application. We hope this message assists your organization in planning for your transition to Kinetic. We look forward to providing more great experiences for you and partnering in their success.

Classic Customizations

Your existing customizations are not going away when you upgrade to Kinetic. They will continue to work in the classic user interface alongside the Kinetic UX forms you have enabled, so you can adopt the new user experience at your own pace without business disruption. During your upgrade to version 2021.2, you will have the opportunity to upgrade your Classic customizations to the Kinetic UX. We'll guide you during the transition with resources and programs to facilitate the upgrade and end-user adoption process.

Customization Upgrade Program

From customizations to low/no-code configurations, we'll guide you during the transition with resources and programs to facilitate the upgrade and end-user adoption process. This is an overview of the process and tools available:

1. Upgrade	2. Convert	3. Verify	4. Deploy
The customization conversion will run during your upgrade to 2021. Classic customizations that have a Kinetic UX equivalent will be automatically	After your upgrade, you'll be able to review the status of the converted customization layers in the Configuration Upgrade Dashboard	Review the issues and use Application Studio to update them or go back to the Win Form to update and then run the conversion program again. Check the	Once the conversions are verified and issues are fixed you can deploy them to the menu.

<p>converted to a layer in Application Studio.</p>	<p>(previously called UBC dashboard).</p> <p>Some UX components will come over automatically and some may need rework.</p>	<p>Conversion Workbench Logs to review details about the converted layers. <i>(MT/Express – request logs via EpicCare)</i></p> <p>You can also engage with the Professional Services Team at this stage so they can do the rework for you.</p>	
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Customer Resources to Ease Adoption

The [Kinetic Resources Site on EpicWeb](#) enables access to all related new UX materials in one place. Make sure to bookmark the page and check it often as we continuously update and add new resources.

Resources to guide you during your UX transition process:

- ▶ Don't miss the [Getting Started With the Kinetic User Experience Guide](#), which includes recommendations on how to start the transition and handle change management to ensure a smooth and easy adoption among your organization.
- ▶ We have now available **25 Kinetic UX Testing Guides** by role or persona. These are helpful to deploy the new user experience in small groups following a phased approach.
- ▶ Learn more about uplifting your classic customizations to the new user experience watching this recording
- ▶ Get familiar with Application Studio here

Ensure a successful UX Adoption with Epicor Learning. There are 2 key places you can learn about the new user experience, besides EpicWeb. You can find resources in the Epicor Learning Center as well as in the Help and Support Panel. These are just some training recommendations, as there is much more training you can find.

Getting Started Epicor Learning Center (ELC)

Hands-on Courses
Training on Demand Video Courses
Learning Paths (Agendas)
Fee-based Live Virtual Training

- **What's New | Kinetic 2021** ELC Folder has all content specific to release
- **New Hands-On Courses** are designed specifically for Kinetic UX
- Existing ELC courses **migrating to Kinetic UX**. Search using keyword "NOT Classic" to see only Kinetic Courses
- Existing **Classic Embedded Ed courses** available in ELC

Enabling Success Help & Support Panel

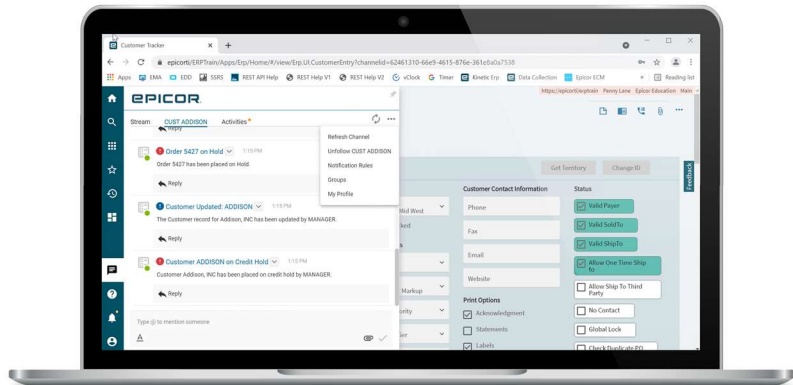
Videos
Articles
Guided Learning (Tours)

- Access the **?** from the Kinetic Home Page and every Kinetic UX form
- **Searchable, contextual** and **relevant** topics
- Display **Field Level Help**
- Access **version, license** and other **system info**
- Links to **Epicor Learning Center, EpicCare, and EpicWeb**

The education offer keeps growing and we continue enhancing the Help and Support Panel. All guided lessons have been updated to 2021.2 and new lessons are added weekly.

Collaborate

First introduced with Kinetic 10.2.500, Collaborate is a secure cloud-hosted platform connected to Kinetic that lets workers chat about parts, orders, customers, data views, events, and just about anything else in Kinetic. They can receive alerts from Kinetic, Epicor IoT, and BPMs and message coworkers about those too. They can share Data Discovery views and communicate with Epicor Virtual Agent (EVA) too. A two-way out-of-the-box integration to Microsoft Teams lets them chat with external people such as customers and suppliers. Collaborate is very much business-focused with its integration to Kinetic, but it operates very much the same way as the chat apps anyone is familiar with and is therefore very intuitive to use.



New Collaborate Features in 2021.2

► **New Collaborate Creator Security Group:**

This new security group can create new groups and add special hashtags tied to a Kinetic entity such as an order or a customer (not to be confused with the normal #hashtag that any user can create). This group can help keep the number of groups and entity hashtags manageable and organized for a tidy Collaborate environment.

► **New Moderator Security Group:**

Admins can assign moderators via a new security group “Collaborate Moderator” to make sure conversations are compliant with company community standards. Any user can privately report inappropriate posts to the Moderator Group. In their special Moderator stream, Moderators can review and action the reported posts and view entity hashtags. Moderators can also change the ownership and membership of existing Collaborate groups.

► **New Security Codes:**

The 50+ notification rules available in Collaborate comprise a convenient self-serve model for users that relieves the burden on IT staff to create BPMs. They now have security codes assigned which support such scenarios as you only want the accounting team to see the notification when an order goes on hold. The system admin can “Allow” or “Disallow” access to these security codes for users and groups.

► **U.S. Government Cloud Availability**

Collaborate is now available in U.S. Government Cloud to meet further security and compliance requirements, for example, government contractors who must comply with ITAR (International Traffic in Arms Regulations).

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

Epicor Virtual Agent 2021.1

EVA is an Azure AI services-enabled agent in the Cloud that lets you speak or text with your own words to get information from Kinetic. Using the EVA app on your mobile device or messaging EVA in Collaborate, you can ask EVA about customers and sales, parts and inventory, suppliers and purchase orders, and workflow task schedules. EVA returns the information you asked for, usually with button choices for the next best actions. You can also create tasks or create and email quotes, purchase orders, and RMAs. This is a convenient time saver especially when you are away from your desk. Best of all, the basic EVA app remains no charge to use (future planned capability packs could have a fee, depending on the scope). Get started using EVA today by downloading “Epicor Virtual Agent” from the Apple App Store or Google Play and asking your system admin to activate EVA for your company.

EVA 21.1 Enhancements

EVA release 21.1 became generally available July 13. Enhancements include:

► **Updated Mobile App:**

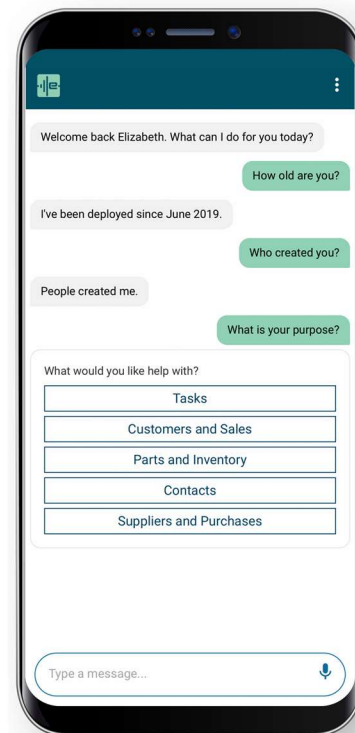
The EVA mobile app now matches the latest branding and color scheme of Kinetic for a unified look. Search for “Epicor Virtual Agent” in the Apple App Store or Google Play and download the update.

► **EVA Chit-Chat:**

Now your users can ask EVA questions like “what’s your favorite color?” and EVA will answer. It makes for a more friendly and natural user experience.

► **Natural Language Processing (NLP) Enhancements:**

Azure AI-enabled NLP lets you use your own words and EVA will understand you. We continue to build up the



language understanding model based on actual customer usage and have also introduced an Automated Test Environment (ATE) so that existing EVA skills are never broken during these efforts. If a user interrupts a conversation with a new command, EVA now handles that more seamlessly.

► **EVA Skill Shortcuts:**

Now you can say or text just the entity, such as a part number or customer ID without any accompanying verbiage and EVA will understand you; for example, you can say “Junction Plug” instead of “Show me Junction Plug” and EVA will display the information for Junction Plug.

Epicor ECM (DocStar) 21.2

Epicor ECM (the new name for DocStar ECM) is an Enterprise Content Management system that transforms your paper-based system into a fully digitized repository, with workflows to eliminate the waste and double-handling associated with paper and poorly maintained online folders and help achieve ISO 9001 compliance. Epicor ECM is configurable for your company’s needs, and while customers traditionally have started with the AP Automation or Sales Automation module, we have found that many manufacturing customers are just as interested in applying the solution to other departments, especially 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.

A New ECM Mobile App

In planning Epicor ECM 21.2, we listened to our customers’ requests for more capabilities added to the Epicor ECM mobile app, especially document capture, content field entry, and workflow tasks. The result is a mobile app completely reimagined in the Epicor Design System that provides many features that approach the functionality of the full desktop browser client. The new mobile app offers these features for users on the go:

► **Capture:**

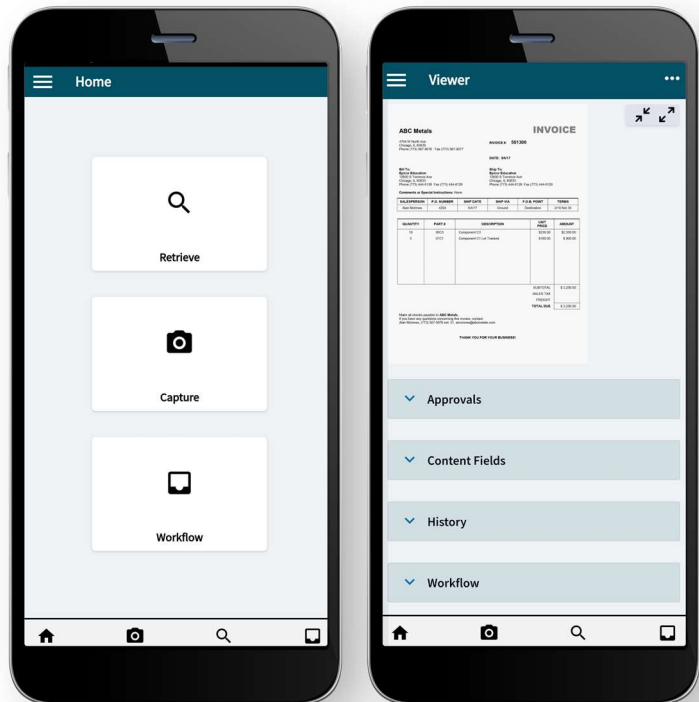
Snap a photo of a document or image with your mobile device or import it from your photo library or file folder. It’s a convenient way to load documents into Epicor ECM.

► **Search:**

Search any metadata content field or content type or set up complex search fields such as “Title Contains AP” AND “Created Before 8/25/2021.” Save your searches for next time.

► **Retrieve:**

Add unlimited field columns to your retrieved lists of documents. The grid scrolls horizontally too and adapts to any size device, landscape, or portrait. Select one or more documents for such actions as View, Email, Request Approval, Workflow Actions, and more.



- ▶ **View:**
View the document on the same screen as its menus for Approvals, Content Fields, History, and Workflow. Pinch zoom in and out and rotate the document. Assign a content type to the document and fill in the appropriate metadata content fields for that document. Assign a workflow and approve.
- ▶ **Workflow:**
Filter the list of workflow documents by workflow type or workflow queue. Perform workflow actions such as Assign Workflow, Restart Workflow, Terminate Workflow, and more.

[Epicor ECM Multifactor authentication](#)

Epicor Identity Provider (IdP) is a centralized single sign-on (SSO) and multifactor authentication (MFA) service provided by Epicor. IdP is available for Epicor ECM and Kinetic cloud customers at this time. Please submit an EpicCare ticket when you are ready to use Epicor Identity.

[Simplified Chinese Language](#)

Epicor ECM 21.2 adds support for the Simplified Chinese language. Previous releases added support for the Canadian French language (21.1) and LAC Spanish (Latin America and the Caribbean) (19.1).

An additional subscription or license is required for Epicor ECM, which includes the mobile app. Epicor ECM concurrent user licenses are used to log in to the mobile app. For these details and to inquire about deployment for users, contact your customer account manager.

Cloud

Kinetic with Enterprise Services in the Cloud

With the 2021.2 release, we are offering a cloud bundle of services designed to serve large-sized organizations. Kinetic with Enterprise Services in the cloud is for customers looking for greater flexibility, providing greater control of their system, and building a strong partnership with the Epicor Support team through an assigned Technical Account Manager.

The cloud services include:

- Isolated cloud infrastructure for more autonomy
- Customizable once-a-year upgrades versus biannually
- Additional processing capacity
- Greater self-service access to your database
- More additional environments
- A designated Technical Account Manager to provide technical expertise and serve as a liaison between Epicor and the customer

Additional cloud services tiers will be available later this year so stay tuned for more information.

An additional subscription is required for this solution. If you are interested in learning more about Kinetic with Enterprise Services in the cloud, please contact your customer account manager.

Epicor Security Suite: New Cellular ISP Failover Offering

At Epicor, we understand the value of keeping your systems and data safe from increasingly sophisticated cyber threats, and we offer a full suite of security offerings based on leading industry technologies.

Epicor Security Suite adds layers of protection to help defend your local networks and hardware. Epicor Security Suite services are operated and managed by Epicor security experts, making it ideal for companies that may not have an in-house IT staff to help maintain proper network security or want to extend their IT security staff or expertise.

Epicor Security Suite includes:

1. **Epicor Secure Firewall Service** – A subscription-based firewall service that includes a SonicWall firewall appliance, service, and support to protect your network at its perimeter. Configuration firewall backups, automated firmware updates, and log reporting data are included.
2. **SonicWall Capture Client** – Next-generation malware protection engine powered by Sentinel One with multiple capabilities to defend against and recover from modern threats such as a ransomware attack.
3. **Epicor Secure Backup** – Offers reliable offsite backup for rapid restore and disaster recovery for on-premises customers, leveraging the Commvault enterprise backup solution.
4. **Launching in November 2021: Cellular ISP Failover** – Cellular internet modem from Cradlepoint serves as a secondary internet connection, providing connectivity during a primary ISP outage or natural disasters like a hurricane or flood.

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

Identity

Epicor introduces Epicor Identity for Kinetic customers with a cloud deployment. Epicor Identity provides an added layer of security and central management of users across Epicor systems for log-in and authentication. With Epicor Identity, users maintain a single log-in to access Kinetic, Epicor ECM (DocStar), Senior Living Solution, Epicor Ideas, the EpicCare support portal, EpicWeb, and the Learning Management System (LMS), with additional systems coming soon.

It is an identity aggregator that handles access across your Epicor systems. The authentication service allows customers to manage access for users that are provisioned in multiple Epicor systems in a centralized location to reduce the security footprint. Usability navigating Epicor systems is also enhanced as users maintain a single log-in. While permissions for each system must be set in each respective application, Epicor Identity will provide the authentication or the entry point. Once provisioned in each system, a user maintains a single log-in through Epicor Identity to access their Epicor applications.

Another modern security feature that Epicor Identity offers is multi-factor authentication. Adding another security challenge for users to access your data will provide peace of mind around cybersecurity protection.

Kinetic customers in the cloud must ensure each user account has a valid email setup in Kinetic. In addition, each customer must name a designated administrator who will have elevated security privileges. To get started, please contact your Epicor customer account manager or log an [EpicCare](#) ticket.

Sales and Marketing Management

Epicor CPQ (Configure, Price, Quote)

Our comprehensive CPQ platform elevates the selling experience and streamlines production for manufactures of highly configurable products. Essential features include:

- Visual product configuration: Enable sales reps and end-customers to configure and interact with products in 3D, from anywhere, including your website.
- Dynamic pricing: Price products in real-time as they're being configured.
- Document generation: Create detailed quotes and stunning proposals with the click of a button.
- CAD and design automation: Auto-generate 3D renderings and CAD drawings, saving engineers valuable time.
- Snap rules engine: Empower non-technical employees to build product and pricing rules with Snap, our no-code programming language.

The integration with Kinetic allows for a seamless connection between sales and operational data, improving demand, planning, and production.

CPQ helps you reach today's customers in exciting new ways, speeds up your sales cycle, and automates the engineer-to-order process from the shopping cart to the shop floor.

Epicor CPQ is a cloud solution. An additional subscription is required for the Epicor CPQ. For details and to inquire about deployment for users, contact your customer account manager.

Epicor Commerce Connect 2.13

Epicor Commerce Connect (ECC) is our comprehensive solution that helps manufacturers like you on your eCommerce journey and that is intended to help you gain market share, improve cost-effectiveness, and serve your customers with an experience that increases loyalty.

Through integration with Epicor CPQ, described above, ECC 2.13 brings the capability for your customers to configure products as they prepare quotes. In addition, ECC 2.13 adds key enhancements that improve site performance and the overall customer experience for your users, leveraging technology to speed content load times and improve the consistency and quality of their mobile experiences. These enhancements also help to improve your Google search rank, making it easier and more likely for buyers to find you.

Please be aware that Supplier Portal won't be included initially for the CPQ integration; direct questions to your customer account manager.

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

SecturaFAB

SecturaFAB (by SecturaSOFT) is a new ISV partnership that brings estimating & quoting enhancements to Epicor manufacturing clients. It's a multi-discipline quoting and estimating software that uses graphical representation and nesting logic to drastically speed up the quote generation process. SecturaFAB optimizes run times, welding costs, complex cutting operations, and more. The main industries this tool serves are fabricated metals, metal services, industrial machinery, packaging, and folded carton. Key benefits include:

- ▶ Increase shop throughput and speed to quote with the ability to import PDF, 3D & 2D CAD Files
- ▶ Build quotes in seconds rather than days.
- ▶ Decrease training time
- ▶ Increase win rate
- ▶ Obtain accurate run-times from machinery
- ▶ Create Consistency

SecturaFAB is a cloud solution. An additional subscription is required for SecturaFAB. For details and to inquire about deployment for users, contact your customer account manager.

Material Management

Country of Origin by Lots

Country of origin by lots capabilities offer the ability to source the same part from multiple vendors from different countries of origin at the Lot level. In today's new NOW, to maintain and be able to supply customer's demand, our customers need the ability to source the same part from multiple vendors in case of a global pandemic, catastrophe, or regional crisis that prevents a single supplier from being able to deliver the part. When sourcing the same part from multiple vendors, the country of origin can be different and needs to be tracked. Previously, we are only tracking Country of Origin at the Part level, which gives no flexibility to our customers when they are sourcing the same part from multiple vendors with different countries of origin. The ability needs to be at the Lot level also, which would account for sourcing from multiple vendors.

Advanced Unit of Measure Enhancements

Key factors to success include the ability to accurately cost and forecast inventory and locate the right inventory to meet the needs of the customer or production easily. In the last release cycle, Epicor introduced the Advanced Unit of Measure (UOM) module to offer transactional dual units of measure and support the complex needs of managing inventories dimensionally. In the latest release, we introduce several key enhancements requested by customers to improve the experience and capabilities of using this impactful module.

Attribute Tracked Transactions

Change Attribute button from 'Select' to 'On the Fly' capability in three manufacturing screens: Job Entry, Job Receipt to Inventory, and Return Material. Allows users to be able to bring remnants back into inventory so that off-cuts and salvage material can be defined with new attributes (like new dimensions) and brought back into inventory for visibility and later usage.

Multi-Company Support

Add AUOM capability to be made global for the following:

- Inventory Attribute Tracked parts
- Dynamic Sales Orders
- Intercompany Sales Orders/Purchase Orders with dynamic attribute tracked parts

These improvements will allow larger companies to transact attribute tracked parts across multiple companies as this is a very common business model in places like Europe where local accounting and other reporting is more easily kept separate.

Inventory Availability

An extension of the AUOM use case where metals service centers need a fast way to find if specific inventory is in stock without the need to start a sales order or quote. This changes the notion of quote/order taking as the user will be able to search for any part without having to first start a quote or order. In the long run, this saves time, as many times once the material is discovered to not be in stock, the customer will call the next shop.

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

Quick Ship 2021.2

Quick Ship integrates seamlessly with the Kinetic platform to help you process shipping transactions quickly and efficiently. Manage overall costs by reducing freight spend and by speeding up onboarding and training processes.

Quick Ship is available in Azure and integrates with your cloud Kinetic platform, providing you with world-class security for business continuity, a flexible technology platform that's always current, and the cost-effectiveness of a cloud solution.

Quick Ship 2021.2 adds the following enhancements:

- ▶ **Customer-Ship-to Address Validation for US customers using UPS.**
 - Ensures collected data is accurate, up-to-date, and standardized
 - Eliminates refunds and redelivery fees
- ▶ **Currency Conversion for Freight Charges:**
 - Reflects the order currency in commercial invoice and billable amount
 - Streamlines financial records and clarifies local billing

► **Local language translations for your users.**

- Now available in Spanish LA, Canadian French, Chinese, Simplified/Traditional, German, Swedish, and Finnish.
- Makes software easier to use for today's global workforce.

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

Epicor EDI (1 EDI Source) Integration

Supply chains require flexibility and speed now more than ever. When your company transacts business electronically using Epicor EDI (a single EDI and B2B integration solution formerly known as 1 EDI Source), prospects and customers can pivot to you quickly, and likewise, you can pivot to different suppliers quickly.

Our EDI/B2B 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.

Epicor offers the following offerings for your EDI and B2B transaction needs:

- **[HQX] HQXchange** – This powerful EDI Platform combines an industry-leading EDI mapping and translation software **[HQ]** and secure data encryption solution **[AS2]** with a comprehensive view or portal of EDI document workflows **[IX]** 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, which works with any EDI translator.
- **[AS2] Complete™** – AS2 Complete is our advanced software that complies with AS2 standards—making it easy for you to communicate secure EDI and other data, create and manage certificates, handle data encryption and decryption, and more.
- **[PX] PartnerXchange** – This web portal solution enables your non-integrated trading partners to send and receive EDI/B2B documents through easy-to-use web forms, without requiring integration to their business systems.
- **Epicor Supplier Portal, the new name for [SDIS] Supplier Digital-Integration Suite** – Epicor Supplier Portal integrates your suppliers with your business system quickly and seamlessly. It provides either an integration solution (for suppliers who can connect to you) or a web portal (for suppliers who can't) through which you and your suppliers can communicate in an easy-to-understand, human-readable format — not 'EDI speak'. You can view documents and status information about sourcing requests and graphical charts that provide insights into EDI data.

These web-based analytics present supply chain activity and alert you to unexpected or non-compliant supplier actions. You'll have real-time visibility into orders, carriers, and warehouses so your team can respond to supply chain breaks immediately.

Included flat-fee services cover recruiting, provisioning, support, and services.

The EDI HQ 7.3 release introduces new eCommerce connectors to easily connect Kinetic systems to Amazon and eBay. These connectors provide a robust option to exchange data with trading partners using a modern API

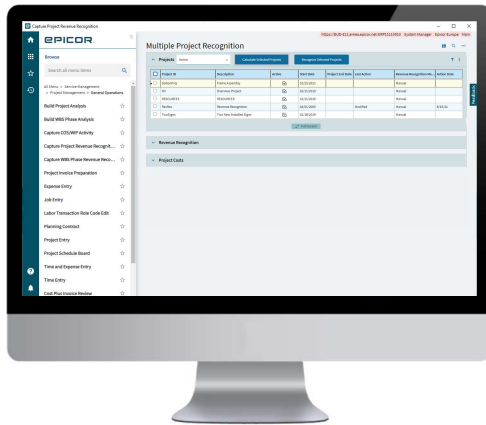
framework that eliminates the need for legacy technologies like FTP and VPN to move data between organizations. Amazon and eBay users who manually enter large numbers of orders on Amazon or eBay can now use these connectors to automate order processing, speed order entry, and fulfillment, and provide real-time stock availability.

An additional subscription is required for this solution, on-premises or hosted. For these details and to inquire about deployment for users, contact your customer account manager.

Project Management

Kinetic Project Management

Mass Project Revenue Recognition



This enhancement for the Project Management module in Kinetic allows you to process the revenue recognition for multiple projects at the same time.

A new dashboard is created, from where you can monitor all your projects simultaneously and you can also run the Project Analysis or the Revenue Recognition programs.

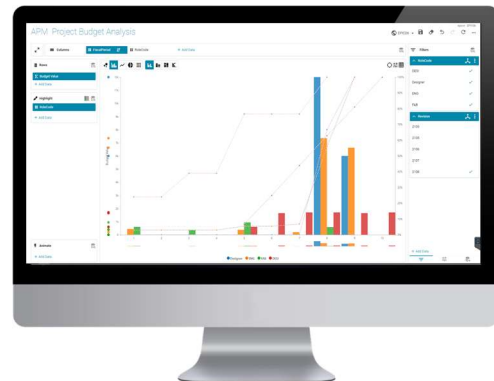
This feature will save a lot of time for Project Managers and finance experts working on multiple projects, as it improves efficiency, and it also helps to eliminate tedious manual work for each project in Kinetic.

Advanced Project Management Enhancements

Epicor Advanced Project Management was launched with Epicor ERP 10.2.600 in May 2020, and it is delivered by our partner, Precise Business Solutions. This is a robust solution for businesses managing complex projects in their day-to-day life, offering detailed project accounting with a dedicated sub-ledger in GL, as well as a contract and subcontract management module supporting the AR and AP side of projects, all embedded in the Epicor Kinetic system.

The Kinetic 2021.2 release features the following functionality enhancements:

- ▶ Time, material, and cost-plus for the contract rates billing type
 - More flexibility in rates and margin
 - Define labor rates and markups in a granular manner
 - Use different charge rates for the same labor type (role code) at a contract, contract line, or contract line/item level
 - Applies to materials and other costs



- ▶ Simplified structure and set up of new business on the revenue side
 - Reduction in effort improves productivity and reduces the potential for error or oversight
- ▶ Simplified billing methodology
 - Consolidation of the various billing methods into a single claim
- ▶ APM templates
 - Creation of controlled contracts, projects, and quotations by an authorized group of users
 - Shortening creation cycles for customers in higher volume contract environments
- ▶ New Data Discovery widget – Project Budget Spread Analysis
 - Flexible analysis of the budget spread over time across multiple Projects, Cost Codes, Fiscal Periods, and Fiscal Years
 - Ability to compare actuals vs forecast and the change of forecast (by revision)
- ▶ New dashboards
 - Contract Claim Status
 - Project Ledger Analysis
- ▶ New budget option for excluding reserve amounts for project accruals
 - Determines whether accruals and other calculations should recognize the entire budget or only the portion released for use
- ▶ Updating actual costs for approved budget spread revisions
 - When a budget spread is approved, there may be a period of time in the current fiscal period, before the next budget spread is created – during this period, the actuals may change

An additional subscription or license is required for the Security Suite. For details and to inquire about deployment for users, contact your customer account manager.

Production Management

Multi-bins for Planning Contracts

This functionality allows the user to define several bins that can hold planning contract parts once the parts have been received into inventory. When we introduced the notion of Planning Contracts, there was a limitation to being able to define only one bin for the Planning Contract inventory. This was an issue for a lot of potential users as material for a contract could be very different sizes and need to be stored in very different places in the facility. This work allows the user to define several bins that can hold planning contract parts once the parts have been received into inventory.

Epicor Advanced MES 8.3.4

Epicor Advanced MES is a critical part of any Smart Factory. Kinetic (the new name of 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.

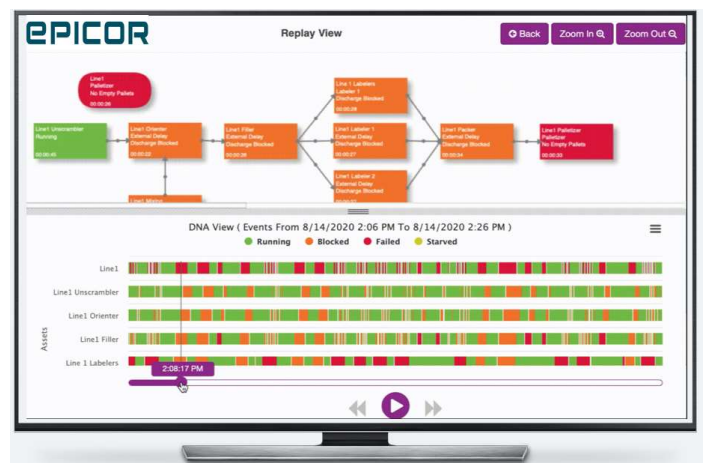
Epicor Advanced MES collects data directly from equipment and operators on the shop floor in real-time, minimizing inaccurate and time-consuming manual data collection. With information instantly in your hands, you can anticipate and solve production problems before they happen. Real-time insight helps 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.

The latest release of Advanced MES introduces several new features including:

Sage Clarity ABLE

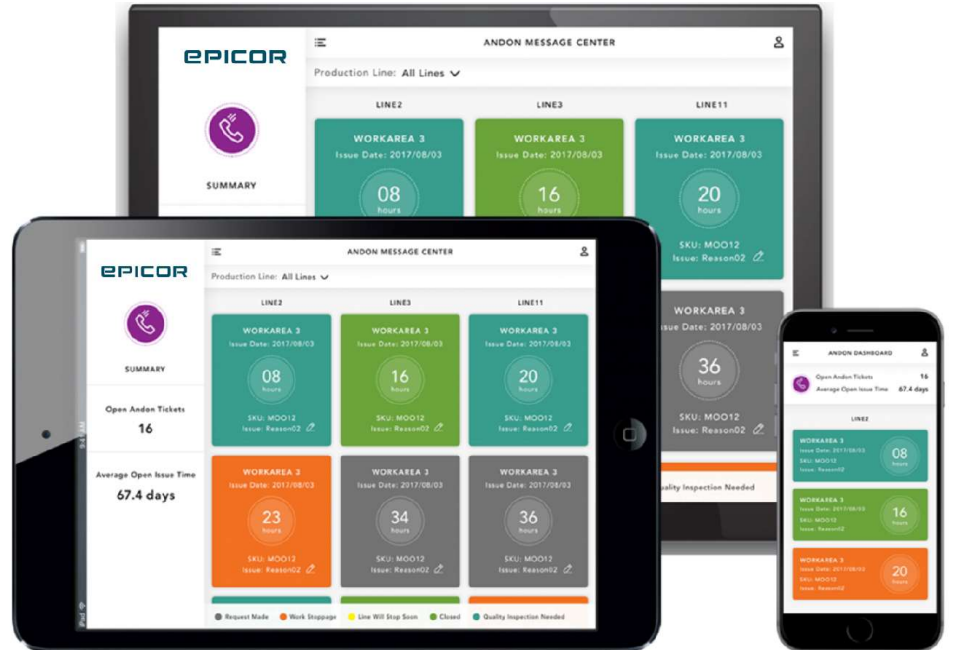
ABLE models machines and production lines with no modification to PLC logic to provide downtime reasons/locations automatically; referred to as Autotagging - production lines and machine stats, counts, and root cause are all coalesced in our logic engine and published via Kepware. This non-intrusive method combined with our advanced diagnostics validation tools allows for remote deployment. Use ABLE for:

- Live Plant views and visualizations
- Better root cause analysis
- To Create Digital Twins from real-time manufacturing data



Sage Clarity Next Gen Andon

Next-Gen Andon allows your team to capture issues and set priorities across any areas that are important to your organization. Common areas that our customers are tracking include Non-Conformance Reporting (NCR), Safety incident tracking, downtime, quality issue follow-up, and warehouse escalations. Issues can be either automatically triggered based on rules and parameters you have established or can be manually initiated as desired. Emails and text messages can be triggered when new tickets are created.



Sage Clarity OneView

One View is a shallow dive analytics tool with mobile manufacturing-focused metrics.

The Epicor Advanced MES Sage Clarity applications are a solution that helps move you into a factory of the future. The solution meets your needs now, with unmatched flexibility to evolve with your business and be a catalyst for your competitive advantage.



New Advanced MES EDA Content Pack



The new Epicor Data Analytics (EDA) Advanced MES pack is being brought to us by our partner Greenmoore and extends the capabilities offered by our out-of-the-box EDA packs. The new EDA for Advanced MES content pack brings with it 36 new dashboards which target common areas on the shop floor for production, tooling, maintenance, and quality.

Included in the content pack are dashboards, views, and scoreboards that include:

- Key performance indicators
- Plant comparisons
- Scrap dashboards
- Downtime dashboards
- Mean-time dashboards
- OEE dashboards
- Availability dashboards
- Performance dashboards
- Mean-time between failures
- Mean-time to failure
- Mean-time to repair
- Schedule views
- Shift production reports
- Tool change views
- Tool requirements views
- Machine parameter views
- Material needs views
- Material used views
- Maintenance views
- Operator metrics
- Top 10 dashboards
- Cavitation efficiency displays
- Cycles out of spec dashboards
- Engineering dashboards
- Help call metrics
- Incident log views
- Utilization metrics
- Job production views
- Machine scoreboards
- Energy usage views

Call for Help Comments

When an operator Calls for Help from the Advanced MES HMI they will now be able to add in comments to further describe their Call for Help. These comments will be available for display on the Real-time display and on reports

Consolidated Voice and Email Setup

To make setting up alerts easier we have consolidated the voice and email setup into one option

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

Product Management

PRO.FILE (PLM/PDM)

PRO.FILE is the latest release of Epicor Product Lifecycle and Data Management (PDM/PLM). PRO.FILE enables you to take your product engineering and product management to next level of digitalization.

Seamlessly manage your mechanics, electrical, electronics and software disciplines on a single, unified platform. Build a digital information twin to manage all your product-related information – from inception to ongoing service delivery. This will enable you not only to create digital twins of your products, but also to engage in true enterprise-wide digital engineering and product management along the entire lifecycle.

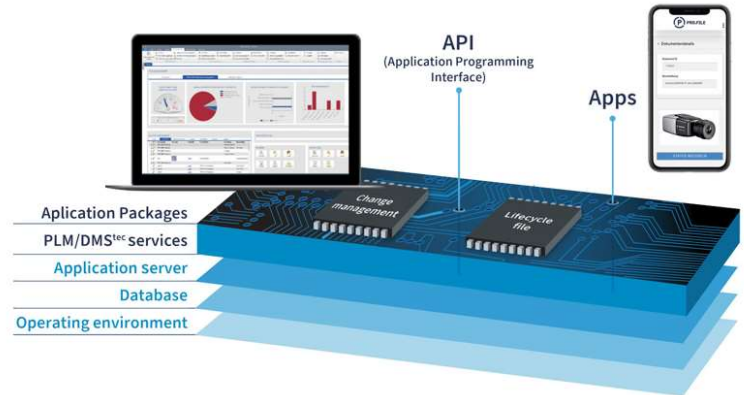
Manage, control, and integrate your product data and documents. As product data backbone, it is the single information platform for all departments, allowing them to engage in seamless and straightforward collaboration. This provides them with insight into the relationships between your product data, accompanying documents, and emails, which in turn results in transparent processes, satisfied customers, and compliance confidence.

PRO.FILE features include:

- Modern, high-performance platform architecture
- Digital engineering and product management support
- Digital information and document management
- Real-time collaboration
- PRO.CEED Application Packages for a quick implementation of digital workflows
- Generation of application-specific objects (ROCO)
- PRO.FILE apps and mobility
- Cloud-ready
- ISI.CONtrol Panel with a new interface and additional configuration options

This new release offers a modern user interface, and faster performance as multi-core support significantly speeds up the loading of large files such as CAD drawings. Epicor PLM and PDM customers can upgrade to PRO.FILE at no additional cost if current on maintenance.

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



Financial Management

Spreadsheet Server

Spreadsheet Server was launched with the Kinetic 2021.1 release in July 2021 as the latest MS Excel® integrated reporting solution in the Epicor portfolio, delivered by the Epicor ISV partner insightsoftware, which previously provided Epicor XL Connect.



In this release, Spreadsheet Server offers several new enhancements to better serve the business needs of our customers.

Periodic Postings

Responding to the enhancement requests articulated by our customers, the built-in GL reports in Spreadsheet Server can work now with the periodic postings. It saves precious time to finance experts at the month-end and the year-end closures. Well beyond just showing a list of GL transactions, you can drill down into the GL data as you wish, and look at the real WIP transactions behind. This capability is built into the standard reports and you can change the drill-down path according to your needs, you can add multiple views as well. Spreadsheet Server can also show any attachments from the Kinetic system, let these be production or sales orders, invoices or payment transactions, or any other transactional or master data. The drill-down is easy to configure and it can fetch any data from the Kinetic system, such as supply chain, sales, manufacturing, and more.



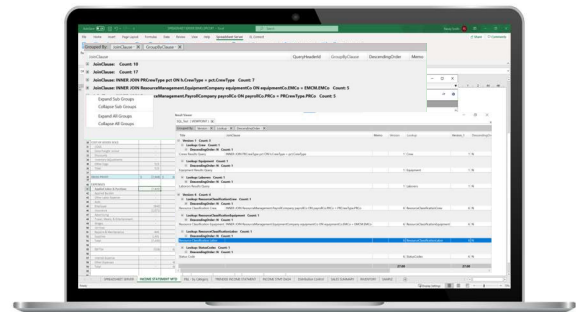
Query Designer Enhancements

The Query Designer is a powerful component of Spreadsheet Server, allowing you to set up new data sources, and you can also create the database queries yourself that feed all the reports with data.

Designing a query smartly will speed up the reporting process, think about only using the columns and rows your business needs – the report refresh times can be significantly shorter.

Several enhancements were introduced in this release for the Query Designer:

- Expand/collapse all grouped data in the query result set (JOIN or GROUP BY clauses) – when designing complex queries, it helps to better combine data by the visual representation of these statements
- Confirmation on deleting fields – a pop-up message preventing the accidental removal of important fields
- Search bar to select the Kinetic data tables in the Expression Builder – save time by entering names
- Export to Excel directly from Query Designer – to confirm visually that the data set is correctly defined



Profile Creation Wizard

User profiles store key settings of the Spreadsheet Server configuration. The new Profile Creation Wizard for on-premises Kinetic systems is a great addition to Spreadsheet Server. It allows system administrators or consultants to customize the user profiles in a fast, automated, and user-friendly manner, eliminating the error-prone and time-intensive manual part of the setup process, resulting in a much faster and reliable implementation for all users.

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

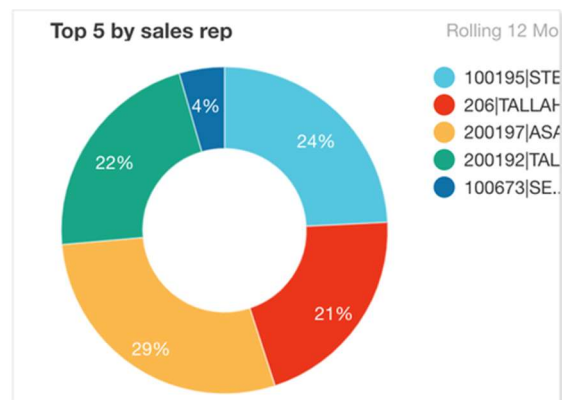
Epicor Data Analytics (EDA)

Epicor Data Analytics (EDA) is a decision enablement solution, powered by Phocas, that delivers content packs for Kinetic financials, sales (with CRM quote pipeline), production, materials, project management, field service, preventive maintenance, and Advanced MES (including OEE and Energy Monitoring content packs). In addition to the aforementioned content packs, which are included with the 5-user **EDA Base** package, these add-on modules are available: **EDA Financial Statements** and **EDA Financial Budgeting and Forecasting**. This affordable, browser-based subscription application in the cloud takes the load off your I.T. staff by hosting the application and warehousing potentially massive amounts of current and historical data for recent and long-term trending analysis.

EDA's power is in its award-winning simplicity. The colorful chart and KPI widgets are easy to understand and filter. However, for many users, the strongest feature is each widget's underlying analysis grid. Users can rapidly focus on an area and even drill down into the ERP transactions.

New Features in the EDA Base Package

- ▶ **Count column available in more modes – total, period, and variance modes:**
Adding a “count” column is a simple way to see totals related to a dimension, e.g., the number of items customers are buying, or the number of customers in a region. It displays the count results as a “measure” column in the grid.
- ▶ **New donut chart option:**
Did you know that it's quicker for the human brain to process a donut chart vs. a pie chart? That's because we can judge the length of donut sections more easily than the area of pie slices. Now you can spice up your dashboards with the easy-to-read donut chart.



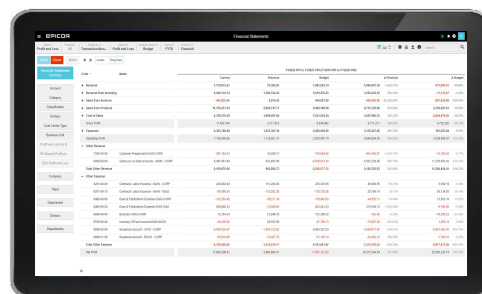
New EDA Site Status Page

The new Status page provides information on the uptime of the site and describes both unplanned and planned outages. On the page, a user can opt-in to receive notifications in the rare case of an unplanned outage. The Status page is here - <https://status.epicoranalytics.com/>

What's New in EDA Financial Statements?

EDA Financial Statements features pre-built financial reports (Profit and Loss, Balance Sheet, Cash Flow, and Trial Balance) as well as a customizable financial statement editor application to produce reliable financial statements using the single source of truth, retrieving data from the ERP system delivered by Epicor.

Any financial statements can be exported in Excel or PDF format from EDA, and the Excel files will preserve groupings and calculations.



This release introduces the following enhancements:

- ▶ Improved visualizations (new value/trend/waterfall widgets)
- ▶ Balance Sheet, Cash Flow variance streams, and statistical streams
- ▶ Ratios for Profit & Loss, and the Balance Sheet reports

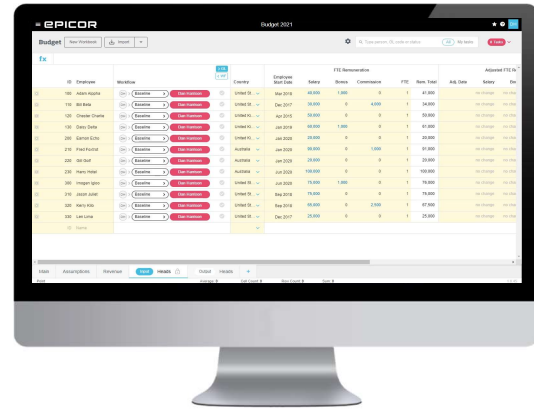
- ▶ More flexibility of columns on statements
- ▶ GL segments available

What's New in EDA Budgeting and Forecasting?

The optional **EDA Budgeting and Forecasting** module completes the financial activities, allowing you to plan financial budgets with multiple stakeholders online and prepare accurate revenue forecasts.

This release improved the following areas:

- ▶ Intuitive forecasting
- ▶ Headcount driven wage costs and benefits
- ▶ Balance Sheet
- ▶ Multiple currencies
- ▶ Sandbox scenario planning
- ▶ Cashflow forecasting



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

Epicor Financial Planner (EFP)

EFP features several major enhancements in this release.

Machine Learning (ML)

Being the first financial add-on product utilizing new technologies such as machine learning, EFP leaped forward by offering new capabilities deploying the power of cloud services for complex and real-time mathematical calculations.

What does it mean for EFP users? With a single click of a button called *Create Prediction* in the web UI, you can get a recommended default set of budgeted values for the next period. Budget owners can save many working hours by having accurate starter values instantaneously and they can focus on what matters in budget planning – any extraordinary information that may affect the business in the future.

This is a huge time saver for budget holders who can focus now on the real differences compared to previous years, incorporating events or information into budgeting that was not known before the current planning year – they do not need to worry about the tedious and time-consuming entry of starter values for hundreds of GL accounts anymore.



How does this new technology work? Behind the scenes, EFP sends the past data series (actuals) of the selected budget lines to a cloud service that automatically tests and compares more than 15 regression models on each line, and identifies the best matching model, then EFP uses the selected model to create the default budget values for the next period. All of this is processed for each budget line independently, automatically, and instantly.

New Kinetic UI Theme

The web-based user interface in EFP was redesigned, applying the Kinetic theme to make it look more natural to Epicor Kinetic customers.

Drill-Down to GL Periodic Postings

One of the major functional enhancements in EFP is the capability of providing access to the GL periodic postings – as requested by many customers.

Azure Active Directory Integration

EFP is now integrated with the Azure Active Directory, enabling the product to use the Microsoft-driven secure and unified user authentication in EFP.

New Australian Data Center

EFP spins up a new cloud data center in Australia to meet data privacy requirements in ANZ, especially useful for our Senior Living Solutions (SLS) customers, who usually run complex reports covering multiple companies.

Improved Dashboards & Widgets

New and improved click-and-drag configurable filtering was introduced for dashboards and widgets. The widget configuration was enhanced and improved based on customer requests, using the advanced easy-to-configure EFP personalized dashboard functionality.

Enhanced REST API Support

Enhanced authentication and security using the new version of the REST API provided by Epicor in the Kinetic cloud-deployed systems.

Improved Web Reports

Automation, speed, and simplicity in the configuration are the cornerstones of the EFP web reports. The automation and the drill-down capabilities were enhanced, and a new “% of” column helps to reduce time spent on creating and modifying standard reports.

Improved Audit Logs

Further enhanced audit logs make EFP contribute even further to transparency and compliance in the financial reporting and budget planning area.

Improved Budget and Forecast Input Sheets

The graphing capabilities of the input sheets used for budget planning were enhanced, new spreading and machine learning capabilities empower budgeting and forecasting.

Multi-tier Input Sheets

The capability of detailed budgeting was improved, which is typically used by Sales (salesperson/customer/product budgeting by the number of units).

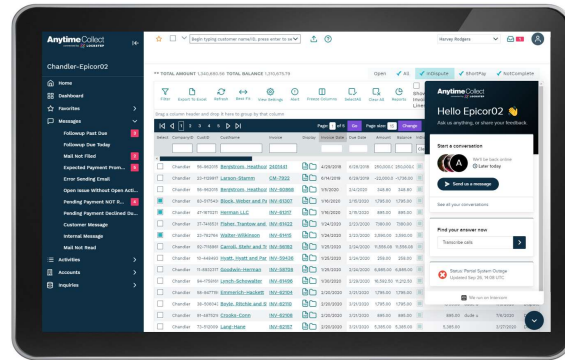
An additional subscription or license is required for this solution. For these details and to inquire about deployment for users, contact your customer account manager.

Epicor Cash Collect

Epicor Cash Collect is a fully cloud-based, add-on product, with a web-based interface, that provides an efficient solution for automating your AR collections. In this release for Kinetic, several enhancements were released to improve your daily collections. The Kinetic 2021.2. the release covers two main areas.

Firstly, customers of those Epicor customers who use Cash Collect and Kinetic can use a self-service website, where they can review and pay their invoices. These customers can select now invoices to process for payments based on the invoice due dates, i.e. if they want to process invoices due in the next 7 days or they can also make payments once in every month on a specific day.

Secondly, automated customer communication was also enhanced. Cash Collect supports having customer hierarchies if you are selling to larger enterprises with multiple sites. These larger customers can make their payments easily and the communication with these accounts has also become easier as the collectors can review aggregated balances and the aging report will help them with negotiating credit limits.



Self-Service Enhancements

- ▶ In Automatic Payments, two new Autopay options:
 - Due Dates: Invoices due in the next 7 days will be scheduled for automatic payment
 - Day of Every Month: All outstanding invoices will be scheduled for automation payment on a specific day of the month
- ▶ Process payments for multiple accounts in an account hierarchy
- ▶ Signup for Paperless Billing using an online form
- ▶ Access online account with Magic Link without a password

Automated Customer Communication Enhancements

- ▶ Personalized Display Name for the e-mail account used for comms instead of “Accounts Receivable”
- ▶ Ten alternate contact details: phone numbers and email addresses
- ▶ Account Hierarchy Personalization: aggregated balances and aging reported at the parent level

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

Kinetic Framework and Tools

Inactivate Customers, Ship Vias, and Part Classes

If a user no longer needs a customer, ship via, or part class record, this new enhancement will afford users with the ability to inactivate those customers, ship vias, and/or part classes. This will reduce the clutter in the system and allow users to access items easier and more efficiently. The inactive records are not part of various searches, and users cannot use them when selling products.

Improvements to Existing CSFs

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

- ▶ Global
 - New Driver table with a Tax ID, driving license, and address details
 - Insurance company and policy number on Customer Shipment Entries
 - Actual Cost Allocation feature included into the Vietnam, Malaysia, Taiwan, Thailand, Indonesia, and Germany CSF packages
- ▶ Argentina
 - New field in the electronic credit invoice
 - QR codes for electronic invoices
- ▶ Australia
 - Payment Times Reporting Scheme
 - Updated AP Bpay file - NAB Bank
- ▶ Canada
 - CPA 005 payment formats additional data to match requirements of Canadian banks
- ▶ China
 - Actual Cost Allocation - Part II: Sales Gross Margin Report
- ▶ Finland
 - Sending e-invoice files to a local operator electronically
- ▶ India
 - E-Invoice template updates
- ▶ Malaysia
 - Unrealized Gain/Loss for Bank Account/Petty Cash Currency Revaluation (revision of two posting rules)
- ▶ Mexico
 - Carta Porte: new electronic shipment document
- ▶ UK
 - VAT format check

An additional subscription or license is required for these solutions. For these details and to inquire about deployment for users, contact your customer account manager.

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 Kinetic 2021.2 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 Insightsoftware
- ▶ Epicor Cash Collect from Lockstep
- ▶ Epicor Financial Planner (EFP) 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.
- ▶ SecturaFAB by SecturaSOFT
- ▶ Epicor Service Pro from MSI Data.
- ▶ Epicor Quality Management System (QMS) by ETQ, LLC

Compatibility

Kinetic 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®.

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

Sustaining and Retired Products

With the release of Kinetic 2021.2, Epicor will not be continuing to enhance several solutions because of obsolescence, next-generation replacement product availability, or low product market acceptance. This may impact your software subscription or license. In these cases, your customer account manager will have the latest information. Below is a list of these products for the 2021.2 release that is transitioning to sustaining support and/or are being retired. We will continue to support these products on earlier releases of Epicor ERP and Kinetic.

Version 1 of MES in Kinetic Design System

With the release of Kinetic 2021.2 this fall, we will no longer make available the MES form released originally in the Kinetic Design System. The latest MES (now called Data Collection) is fully functional and ready for use. This former version did not support configuration and had limited use by our customers. We plan that removing it will not be problematic for users.

Version 1 of Scheduling Boards in Kinetic Design System

With the release of Kinetic 2021.2 this fall, we will no longer make available the Scheduling Board forms released originally in the Kinetic Design System. The latest Scheduling Boards are fully functional and ready for use. This former version did not support configuration and had limited use by our customers. We plan that removing them will not be problematic for users.

Upgrading to Kinetic

At Epicor, we firmly believe all users gain significant benefits by upgrading to Kinetic software. For users on the Epicor ERP 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 Kinetic 2021.2 without taking steps to install intermediate releases.

To simplify the upgrade process from Epicor Vantage®, Epicor Vista®, Epicor ERP 9, and Epicor ERP 10, to Kinetic 2021, 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.

This table provides a quick overview of how your licensing is impacted when you upgrade to Kinetic.

- If you are currently running on a previous version of Epicor ERP listed below on-premises, and you upgrade to Kinetic on-premises, there will be no license change as it’s just considered an upgrade within the same deployment.
- If you choose to move to the cloud from and on-premises, there will be a license change to transition to the SaaS deployment.

Current Solution	Upgrading to Kinetic Cloud	Upgrading to Kinetic On-Premises
Vantage/Vista	License change to SaaS	No license change, just an upgrade
ERP 9	License change to SaaS	No license change, just an upgrade
ERP 10	License change to SaaS	No license change, just an upgrade

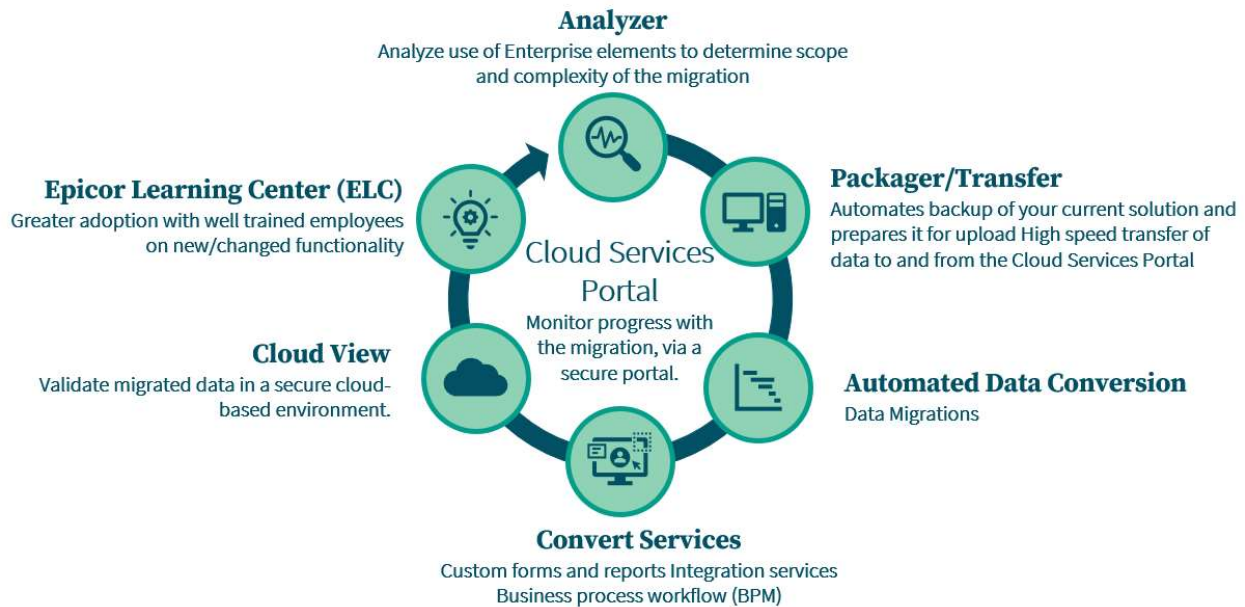
Upgrade program

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.

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 Education, and onsite business consulting.

Cloud upgrade tooling and services

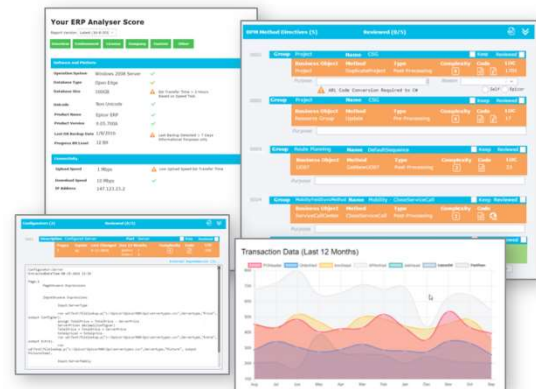
To encourage our Vantage, Vista, Epicor ERP 9, and Epicor ERP 10 users to upgrade, we have invested in cloud tooling and services dedicated to easing the process. Taking advantage of cloud resources has helped our teams reach new levels of efficiency and collaboration. Below is a matrix of the availability of services.



Analyzer

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

We have enhanced the Analyzer to provide guidance on the effort that will be required to adopt the new user experience. The report will show which of your classic customizations are Kinetic UX friendly and which are not:



- ▶ Kinetic UX Available: There is a Kinetic UX equivalent available.
 - Kinetic UX Compatible: It's going to automatically convert during your upgrade to version 11 through the Conversion Workbench.
 - Kinetic UX Re-Work: There is some re-work that needs to be done after the conversion.
- ▶ Kinetic UX Not Available: There is no Kinetic UX equivalent as of the running of the report. You can continue using the Win Form with your classic customization. You can re-run the report at any time to get the latest status on the screen.

Configuration Upgrade Dashboard

The Configuration Upgrade Dashboard (previously known to cloud customers as Unique Business Component Dashboard) is a tool that is now available in the base product for both on premises and cloud customers. After your upgrade to 2021.2, you'll be able to review the status of your converted Kinetic UX layers in this dashboard through a new tab called **Customizations/Personalization**. Learn more about the Configuration Upgrade Dashboard in the help system.

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



Currently, Reconciliation Reporting is only available for Epicor ERP 9.05 users upgrading to the latest release of Kinetic.

Cloud View

Once data converts, Epicor offers a secure cloud environment where users can view their data in a Kinetic 2021.1 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, 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

Epicor Learning offers 75+ Upgrade Essentials courses for Vantage, Vista, and Epicor ERP 9 that are designed to train users on the functionality in the new release.

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 Epicor ECM (DocStar)

Epicor has seen great success in migrating Altec customers to Epicor ECM (the new name for DocStar) and we encourage all remaining Altec customers on Epicor ERP 10.2.600 and higher to move to Epicor ECM to take advantage of new features and help ensure business continuity. Epicor ECM is an Epicor-owned product that will continue to be actively developed and enhanced for Kinetic going forward.

The basic migration path is as follows:

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

Note: Epicor ECM was first made available for Epicor ERP versions 10.1.600 and above. Some of these versions are also in [Sustaining Support](#) mode and must be upgraded before sales of Epicor 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 18 languages across our 17 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 with 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 Kinetic 2021 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/functionality, 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.

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
- Epicor Ideas crowdsourcing workspace for product enhancements

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](#).

Support Offering: Extended Support for Two Years

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. As of the 2021.2 release, Extended Support has been expanded from one to two years. The service includes:

- Two years of Extended Support – starting from the first day the product release (Extended Support Release) moves to Sustaining Support, continuing for 24 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 [Kinetic Software Support Lifecycle Policy](#) on EpicWeb for more information.

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

Product Release	Release Date	Support Stage	End/Transition Date
Kinetic 2021.2	October 28, 2021	Active	Move to Sustaining October 28, 2023
Kinetic 2021.1	June 10, 2021	Active	Move to Sustaining June 10, 2023
Epicor ERP 10.2.700	October 22, 2020	Active	Move to Sustaining October 22, 2022
Epicor ERP 10.2.600	May 21, 2020	Active	Move to Sustaining May 21, 2022
Epicor ERP 10.2.500	October 17, 2019	Sustaining	Currently in Sustaining
Epicor ERP 10.2.400	May 16, 2019	Sustaining	Currently in Sustaining
Epicor ERP 10.2.300	October 17, 2018	Sustaining	Currently in Sustaining
Epicor ERP 10.2.200	April 19, 2018	Sustaining	Currently in 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

Epicor Learning

Epicor Learning provides the tools and resources your team needs for success. Epicor Learning Center offers you a complete role-based training program that guides users through essential courses and exercises building a solid foundation of knowledge and skills. Our in-product experience offers relevant and fast answers in a variety of formats, allowing you to read, watch, or go hands-on to complete the task at hand. Get productive, stay productive with intuitive, user-friendly tools!

- ▶ Epicor Learning Center (ELC)
 - Video-based courses
 - Hands-on exercises
 - Role-based training agendas
- ▶ In-Product Experience
 - Help and Support Panel
 - How-to videos
 - Help articles with step-by-step instructions
 - Guided Learning allowing process-based learn-as-you-go
- ▶ Release documentation

The below graphic represents content that is new for our Kinetic 2021.1 release across the learning resources:

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

What's New in Epicor Kinetic 2021.2

Epicor Learning Center

Whether you want to learn a little or a lot, ELC has you covered! Check out the Course Catalog What's New 2021.2 folder for a complete listing of new content for 2021.2.

Video Courses

23 new videos with titles such as:

- Using the Application Studio Home Page
- Building Data Views in Application Studio
- Moderating Collaborate Users and Content
- Using Grid and Grid Tools
- Setting Up Advanced Unit of Measure
- Buying and Selling Quantities with Advanced Unit of Measure

Hands-on Exercises

18 new Hands-on exercises, with titles such as:

- MRP
- MRP—Recalculation Needed
- Allocations

- AMM—Fulfillment Workbench
- Replenishment
- Job Batching
- Method of Manufacture
- Time Management
- Kinetic Configurator
- Quality Assurance
- Advanced Planning and Scheduling

Learning Paths

Video and hands-on courses are mapped into learning journeys through agendas and roles, such as:

- Application Studio: Basic UI Modification
- Application Studio: Core Concepts and Approaches
- Application Studio: Extending UI Modification
- Kinetic Foundations—Getting Started
- Kinetic—Configurator
- Kinetic—Advanced Planning and Scheduling
- Kinetic—Job Management—Beyond Basics

Help and Support Panel

On-the-job learning that is intuitive, fast and easy to use.

11 videos with titles such as:

- Custom Message for Reset Password
- Converting Personalizations into Application Studio Layers
- Adding a Kinetic Dashboard to a Menu
- Adding a Kinetic Customized Form to a Menu
- Publishing Kinetic Customization Layers to the Menu
- Enable or Disable the Kinetic User Interface for a Menu Item

12 Guided Learning covering workflows such as:

- Project Tracker
- App Studio Customization Tour
- User / Groups Report
- PCID Split / Build / Merge
- Receive Transfer Order
- Move WIP
- General Ledger Account
- Close Cash Day
- Customer Creation

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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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