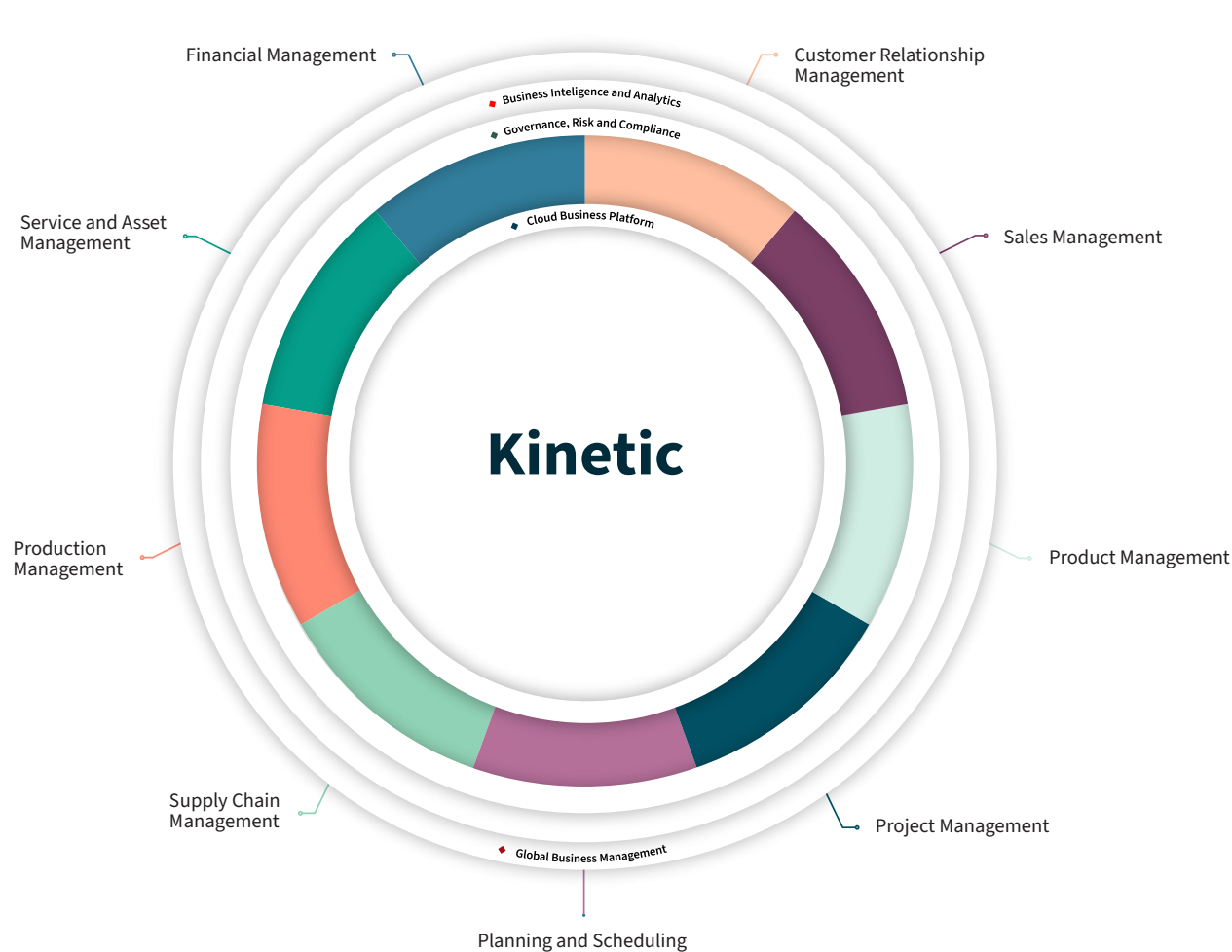


EPICOR

Cloud Business Platform



MANUFACTURING



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

- ### Customer Relationship Management
- Epicor Contact Management
 - Epicor Marketing Management
 - Epicor Lead and Opportunity Management
 - Epicor Case Management
 - CRM Mobile
 - Integration to Salesforce.com*

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

- ### Planning and Scheduling
- Forecasting
 - Master Production Scheduling
 - Smart Demand Planning
 - Epicor Material Requirements Planning (MRP)
 - Scheduling and Resource Management
 - Advanced Planning and Scheduling

- ### Production Management
- Epicor Job Management
 - Advanced Production
 - Kanban Lean Production
 - Data Collection
 - Epicor Advanced MES
 - Quality Assurance
 - Epicor Quality Management System (QMS)

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

- ### Sales Management
- Estimate and Quote Management
 - Order Management
 - Sales Order Automation
 - Epicor EDI/Demand
 - Management-Point of sale
 - Epicor Commerce
 - Dealer Portal
 - Epicor CPQ

- ### Project Management
- Project Planning and Analysis
 - Project Generation
 - Project Billing
 - Resource Management
 - Contract Management
 - Planning Contract
 - Time Management
 - Expense Management
 - Epicor Advanced Project Management (APM)

- ### Supply Chain Management
- Purchase Management
 - Supplier Relationship Management
 - Supplier Portal
 - Inventory Management
 - Epicor Advanced Materials Management
 - Advanced Unit of Measure
 - Shipping and Receiving
 - Epicor Quick Ship
 - Epicor Warehouse Management System (WMS)
 - Supplier EDI and B2B Integration

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

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

- ### Cloud Business Platform
- Mobile, Browser-Based Experience
 - Epicor Automation Studio, Powered by Workato: iPaaS + Automations
 - Epicor Virtual Agent
 - Epicor Collaborate
 - Enterprise Search
 - Epicor Learning
 - Epicor Business Process Management (BPM)
 - Epicor Enterprise Content Management (ECM)
 - Business Workflow Automation
 - IoT and IIoT Applications
 - Epicor Commerce
 - Epicor ED and B2B Integration
 - Electronic Reports Engine
 - Epicor Application Studio Configuration
 - REST Services and Epicor Functions
 - Updatable Dashboards
 - Epicor Integration Cloud
 - Deployment Flexibility
 - Microsoft Azure Cloud
 - Security Management
 - Data Fabric

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

Contents

Improved Employee Experience Drives New Levels of Efficiency	6
Innovative Tools Boost Greater Productivity	10
Align Greater Fit to Business Needs with Configuration and Integration Technologies	16
Pivot Easily to Meet Demands with Flexible Cloud Solutions and Deployment Choice	19
Secure Critical Business Systems with Reduced Effort	21



Introduction

Kinetic delivers a scalable, cloud solution with a focus on agility so that you can adapt to the changing business climate while doing so with the peace of mind that your critical business systems are secure and ready when you need them. The solution delivers pragmatic innovation on a regular basis to keep your business up to date with the latest industry functionality that keeps you highly competitive. Enable every employee, regardless of tenure or experience with an easy-to-use intuitive cloud-based user experience and embedded learning guides.

Made with manufacturers, for manufacturers, Kinetic combines deep industry capabilities, great user experiences expected by today's workforce, and innovative technology to help you grow.



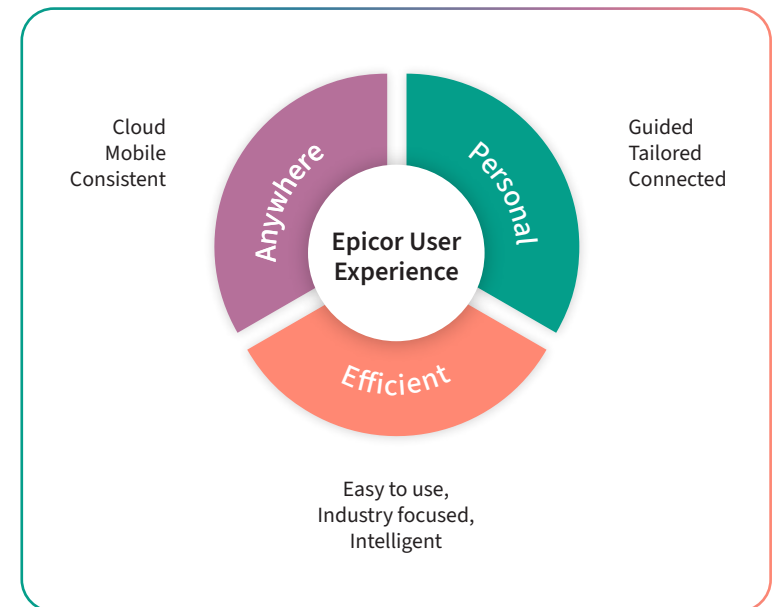


The platform technology underpinning the Kinetic application is based on a service-based Microsoft® .Net architecture, optimized on Microsoft SQL® and standardized on Microsoft Azure®. It delivers the latest technology advancements requested by manufacturers including cloud, IoT, and AI/ ML. Kinetic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

The Epicor Kinetic platform promotes efficiency as it helps our customers to both use and enhance Epicor applications at a business level - rather than a technology level. Businesses can start with the building blocks: business process optimization from our Business Process Management (BPM) and Epicor Functions solutions, and technology such as Kinetic RESTful service APIs to extend to other applications in an upgrade-resilient and secure way. Or they can enable more Citizen Integrators across departments with Epicor Automation Studio, an iPaaS (integration Platform as a Service) with workflows and automations that will speed their digital transformation.

The capabilities of the Kinetic Platform include:

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



Improved Employee Experience Drives New Levels of Efficiency

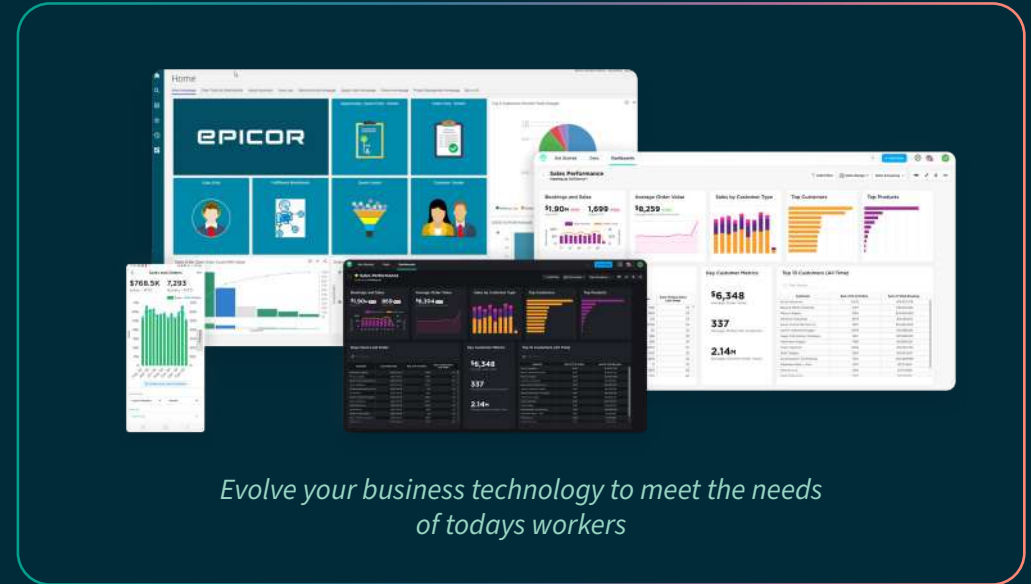
User Experience

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

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

The Kinetic users experience delivers a user experience that is:

- Made for use anywhere, browser-based in the cloud, on any device with a consistent experience
- Made for personal use with guided workflow, easy tailoring, and the ability to connect digitally
- Made for efficiency and greater productivity with a simple, easy to use interface that offers industry-focused features and leverages cognitive technologies for greater automation



Personalization

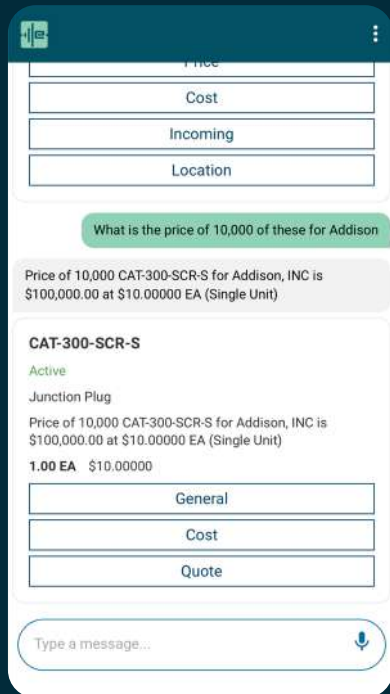
Create your own experience to maximize productivity. Simplify your job with quick optimizations to the personal workflow in the screens you use every day. Configure grids, hide/show UI fields, or collapse/expand panel cards depending on your needs.

Epicor Virtual Agent (EVA)

Epicor Virtual Agent is an artificial intelligence (AI) powered tool that provides you access to your Epicor system. Users across the enterprise will be empowered by the context-aware, natural language processing of EVA that allows them to converse with the app through text or speech on their Android® or iOS® mobile devices.

EVA is also available on the desktop in Collaborate. EVA is powered in part by Microsoft Azure AI services—a cloud solution that makes AI and cognitive technologies accessible and scalable for companies of all sizes. For Epicor users, the power of artificial intelligence cannot be understated. Today's digital economy is influencing the growing demands of end customers and B2B buyers for prompt, personalized service, and rapid

order fulfillment. To match these demands, companies are increasingly turning to AI and cognitive technologies. EVA solves problems today and lays a strong foundation for intelligent technologies that integrate with their Epicor system. Just launch the EVA app on your device, complete the secure login, and start texting or talking. You can access parts, pricing, and other customer or supplier information. EVA initiates actions based on this information—including creating a simple purchase order or quote or converting a quote to an order. When you finish your inquiries and are ready to act, either press a button or say “create a quote for 40 of ABC part,” for example. Since EVA is aware of the conversation’s context, the application knows which customer and item to quote.



Talk to EVA for queries and actions in Kinetic

Collaboration

When workers engage with each other to solve problems and innovate processes, your business gains a competitive advantage. Collaborate helps them do that effortlessly.

Collaborate is a productivity and collaboration tool for the whole enterprise that is built on the cloud. With hashtags and mentions, it’s easy for groups of workers to connect on a topic. Additionally, there are controls for security and moderators. As a messaging app embedded in Kinetic, Collaborate reduces the amount of time spent in meetings and emails by enabling staff members to discuss orders, customers, data views, events, and just about anything else, in context with hotlinks to system records. Employees can start new messages that can be related to a Kinetic record they have open or they can subscribe to system notifications. Those on the go can still receive real-time messaging and system notifications thanks to a responsive mobile browser design that fits any size device.

Collaborate has key integrations that drive worker productivity including:

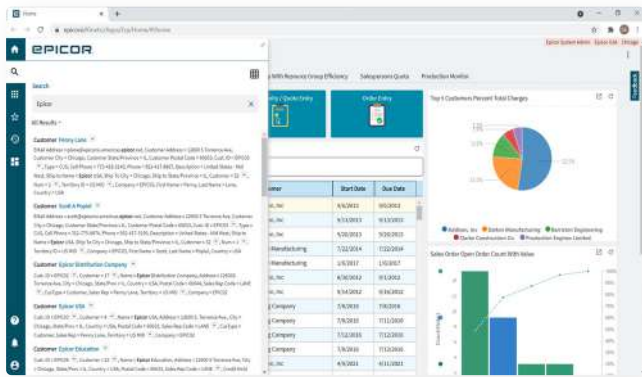
- Microsoft Teams®: integration enables teams with external players to connect on project details by Sharing Collaborate messages and documents
- IoT: Notification of adverse events in Kinetic or directly from your equipment through IoT, drives new levels of responsiveness and productivity.
- Epicor Virtual Agent (EVA): Integrates to EVA, delivers on the simplicity through natural language to answer questions of Kinetic.
- Data Discovery: Offers users the ability to share Data Discovery metrics through Collaborate.
- File Sharing: Easily share files digitally with Collaborate including sharing files from Epicor ECM (Enterprise Content Management) to a Collaborate message stream. Talk to EVA for queries and actions in Kinetic. Messaging connects workers, suppliers, customers, and systems.

Enterprise Search

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

Complete functionality includes:

- Secure search results
- User-definable searching
- Easily find relevant business data
- Data drill-down capability
- Complete search results in a browser



Simplify looking for things in Kinetic with Enterprise Search

Workbench and Tracker Views

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

Information Worker

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



Flexible, Curated Learning Pathways

Build your Foundation



Charts your courses and pathways



Introductory videos



Practice and reinforce skills



Stay Productive



Short videos and FAQs



"How to" walk throughs while you work



Active suggestions, tips and resources as you need them



Extend Your Knowledge



Master courses and test your knowledge



Articles and technical guides

Epicor Learning

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

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

Hands-on courses can be accessed individually, but they are also integrated into our Epicor Learning Center (ELC) role-based agendas, providing a more blended, immersive learning experience where people can first WATCH, and then DO. Hands-On Exercises are launched directly from ELC, so they can be assigned and tracked. And as part of the Epicor Learning experience, they are built strategically to work with and support the video content. This centralizes the whole learning experience and organizes our training into definitive learning paths that take you from new user to expert.

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

Help and Support

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

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

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

Innovative Tools Boost Greater Productivity

Business Process Management

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

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

BPM is integrated across the toolset to enable easier deployment of key integrations and business processes in your ERP. For example, BPM works with Collaborate as a notification engine of events, with Epicor Functions to invoke standard processes and facilitate more elegant integrations, and Automation Studio to initiate its automations and activity workflows.



Complete functionality includes:

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

Change Data Capture

Change Data Capture (CDC) is a solution that allows you to synchronize information in real-time between Kinetic and other systems and applications. It identifies and captures data that you create, update, and delete from Epicor and makes this change data available for use by different applications. A use case for this solution includes Collaborate where greater responsiveness in the business workflow can be more easily achieved with instant notifications guiding your processes. To offer more opportunities to build these notifications into your processes, Collaborate lets users create custom notification rules. This is achieved with the Change Data Capture (CDC) management solution.

Task Management Workflow

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

Applications for IoT

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

Epicor IoT

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

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

Advanced MES

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

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

Service Pro

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



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

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

Below is an overview of the portfolio available with Kinetic.

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

Advanced Print Routing

Your customers, suppliers, and internal users all have different reporting and document requirements. Some may need documents e-mailed as an attachment or deposited into a designated folder for FTP delivery. Others may still need printed copies. Information needs vary from customer to supplier, as well as between internal roles. Advanced Print Routing (APR) is built right into Kinetic to provide important business documents

and reports to the right people at the right time with the right information. Easy-to-use tools quickly create, route, and format your reports and commercial documents. You can send order confirmations or invoices to customers, generate and submit required financial reports, and deliver parts reports or pick-lists to your operations personnel. With Advanced Print Routing, your organization can reduce reporting errors, improve customer satisfaction, and eliminate the hassle of supporting additional applications.

Enterprise Content Management

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

Complete functionality includes:

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

Optional functionality includes:

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



Intelligent Data Capture

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

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

Dynamic Documents

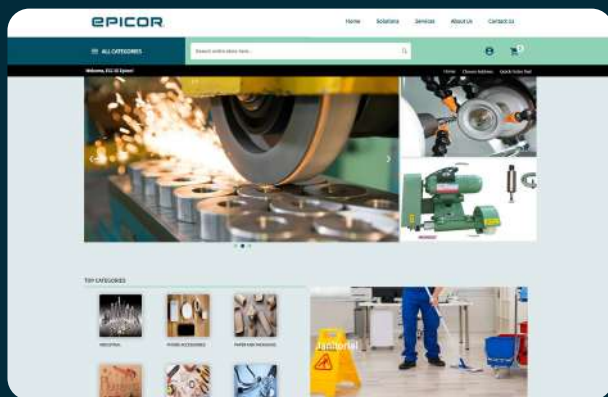
Dynamic Documents is a product which gives our customers the flexibility to design their own form and drive business actions within Kinetic. This feature will provide a Word Plug-in where a Word document is defined and converted into a PDF and leveraged in a Kinetic platform which will then allow the document type as an extension of instructions to the operator. This document will be associated with the Kinetic Job Entry, within Data Collection. This PDF document template will be created by the customer administrator, which can be saved and will be available when starting production or starting/ending setup; operator will be able to enter data to acknowledge that an action was completed.

eCommerce Platform

Businesses looking to improve customer service, reduce lead times through new business efficiency, and deliver new opportunities to sales will often invest in eCommerce solutions. Commerce Connect was designed to solve the challenges of manufacturers and their unique needs as they integrate an eCommerce solution. Commerce Connect is built on the Magento platform—a leader in eCommerce—with a comprehensive ecosystem and tooling in constant development to enable businesses to stay current with latest commerce trends. Commerce Connect is also fully integrated with Kinetic and offers the synchronization required by most commerce sites while

boasting additional capabilities needed by manufacturers—including full integration with Kinetic product configuration capabilities. Finally, Commerce Connect easily extends to new data elements and provides a platform for eCommerce business growth.

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



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

EDI and B2B Integration

Supply chains require flexibility and resilience now more than ever. When your company transacts business electronically, prospects and customers can pivot to

you quickly. You also have similar benefits when transacting with your upstream suppliers—in fact, Epicor EDI (formerly called 1 EDI Source) can connect any supplier to you even if they don't have an EDI/B2B solution themselves. No matter whether you need traditional EDI or other B2B formats such as JSON, XML, REST API, and connections to eCommerce marketplaces, Epicor EDI with its 30 years of innovation has you covered. Our EDI solutions are compliant with leading supply chains and retailers including Caterpillar®, General Motors®, Eaton®, General Electric®, Amazon®, Walmart®, Lowe's®, Kohl's®, and many more.

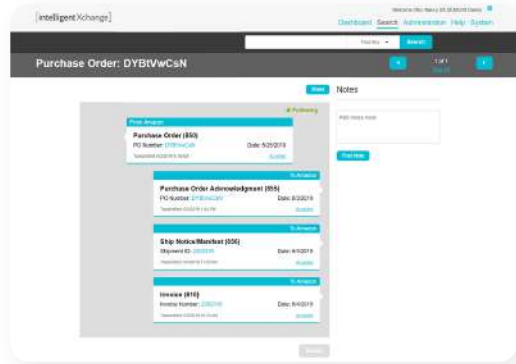
Base functionality is contained in the Epicor EDI [HQ] HeadQuarters™ module, the industry-leading EDI and B2B mapping and translation solution that allows full control of EDI operations.

Complete HeadQuarters functionality includes:

- Highly performant JSON API endpoints built exclusively for integration to Kinetic
- Support for ANSI X12 and UN EDIFACT EDI standards
- Modern, easy-to-use interface
- “One-click” trading partner setup
- Scalability

Optional functionality includes:

- EDI/Demand Management – a Kinetic module (refer to the “Sales Management” chapter for more information)
- Epicor Supplier Portal (refer to the “Supply Chain Management” chapter for more information)
- [HQX] HQXchange – Bundled EDI and business visibility
- [IX] IntelligentXchange - Visibility and analytics tool for translating EDI data
- [MX] ManagedXchange – Fully managed EDI utilizing [HQX] software
- [AS2] AS2 Complete – AS2-compliant for secure data transport, encryption, and certificates management
- eCommerce marketplace connectors



View B2B transactions in easy-to-understand text message format instead of “EDI speak”

Electronic Reports

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

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

Demand-Side Documents

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

Supply-Side Documents

- (ORDERS, 850) Purchase Order – Outbound
- (INVOIC, 810) Invoice – Inbound
- (DESADV, 856) Adv. Shipping Notice – Inbound
- (DELFOR, 830) Planning Schedule – Outbound
- (DELJIT, 862) Shipping Schedule – Inbound

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

Align Greater Fit to Business Needs with Configuration and Integration Technologies

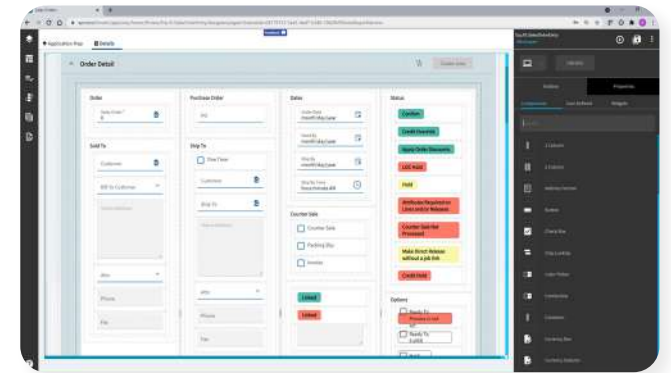
Application Studio Configuration

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

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

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

- Cloud friendly
- Epicor Functions
- BPM integration
- Low code/no code configurations
- Upgrade resilience
- Design environment



No code/low code configurations provide flexible solutions to help you stay ahead.





Epicor Functions

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

Business Activity Query Views

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

Cloud SDK

Without having to write a single line of code, users can create additional user defined (UD) fields in Kinetic that automatically generate database tables and a REST API namespace with basic methods to expose the UD Field across Kinetic to tailor custom business applications.

REST API

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

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

What you can accomplish with the Kinetic open APIs include:

- Anything the user interface (UI) can do, you can do with our Open APIs
- You can create your own custom applications and connect with Kinetic
- You can integrate data into other business systems and applications
- Epicor Functions let you create your own RESTful services that you can use anywhere, especially custom logic for whatever you want
- BAQs let you create custom views that you can use anywhere in the system
- Integration with external systems with API keys and added security

Epicor Automation Studio, powered by Workato

Automation Studio is a cloud-based enterprise automation platform that can automate the connections of Kinetic things to other things outside of the Kinetic platform as well as automate between things inside the Kinetic platform. Using little to no coding, your Citizen Integrators can easily integrate and automate scheduled and event-triggered workflows and robotic process automations (RPAs) between apps, data, and Kinetic with this module embedded in Kinetic. Automation Studio is commonly referred to as an integration platform as a service (iPaaS), but is more accurately described as an integration-led automation module. Salesforce, ADP, and ServiceNow are just a few of the 1,000+ connectors available. Over 400,000 automations (known as recipes) are also available in Workato's online community, which they may easily customize to their specific business needs. Additionally, Epicor provides Industry Templates, a curated collection of recipes created by Epicor Development and customers exclusively for Epicor customers.

Without ready-made integrations and automations, workers can squander hours manually logging data from other sources and updating records in Kinetic or following manual procedures, such as approvals and data audits, instead of focusing on the value-added tasks they would rather do. Automation studio addresses these issues with an enterprise-class integration tool, powered by Workato, that can be governed and monitored by IT, but that also offers the ease of use and low barrier to entry expected from consumer applications. The advantages will be felt throughout the organization.

Finance and Accounting will benefit from automating monthly exchange rate adjustments in Kinetic, Sales will benefit from producing an order in Kinetic from an opportunity in Salesforce.com, and HR will benefit from uploading labor data from Kinetic to ADP. Automations aren't just triggered by integrations to things outside of Kinetic; Kinetic events can also activate automated procedures inside Kinetic, such as correcting data that was found to be incorrect after a transaction. These are just a few of the many examples that can assist your company in accelerating its digital transformation.

Compared to other integration methods, Automation Studio is easier to use, monitor, and debug, it runs in the cloud, and you can choose from 400,000+ recipes and 1,000+ connectors to outside apps. Automation Studio covers more scenarios and its recipes can be run from any of these starting points:

- Trigger from an app – for example, “when a new or updated record event happens in Kinetic, do this...”
- Run on a schedule – Any time-based schedule, for example, every five minutes, hourly, daily, weekly, or any chronological calculation you want.
- Trigger from a webhook – a “lightweight API” that waits for a response; for example, it can generate an email containing buttons “Approve/Reject Purchase Order.”
- Trigger from another recipe – lets you separate repeatable sets of actions into recipes that you can re-use in other recipes.
- Trigger from an API endpoint – makes a recipe an extension of any other systems that can call an API, such as a recipe initiated by a Kinetic BPM or Function.

Epicor Integration Cloud powered by Jitterbit

Epicor Integration Cloud is the platform of choice for business system integration to allow customers to meet their specific business needs, which may also include compliance with ITAR and other data regulatory requirements with extensible integration. Beyond the standard integrations to Salesforce, and other packaged integrations spanning industry leaders in such areas as CRM, eCommerce, Analytics, 3PL/Logistics, and HR, it is possible to create additional integration mappings of standard objects. Custom fields can also be included in

synchronizations and automation using the Jitterbit Harmony studio in the EIC Platform. This can be done at any time—either during an initial project or in a subsequent phase by the Epicor Integration team or self-service by the customer. The Epicor Integration Cloud includes self-packed training that allows an IT resource to come up to speed on building integrations to different end points, amending an existing integration, monitoring transactions, and keeping pace with evolving APIs.

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

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

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

- Microsoft Azure public cloud with its rich cloud infrastructure and services
- Separation of the application infrastructure from the database layer, providing additional security and control over your cloud environment
- Industry cloud expertise where solutions unique to your industry are available such as the Life Sciences Cloud and Azure Government Cloud
- Cloud upgrades twice a year with innovative new functionality, and minor security updates every month to keep your business information protected
- Antimalware, redundant backups and disaster recovery in-region for business continuity and resiliency
- 99.98% historical global uptime—we run Epicor solutions on world-class Azure datacenters in all major regions worldwide, and you can view our uptime anytime online at <https://status.epicor.com/#/>
- A partner ecosystem certified for industry cloud and enabled with tooling to help ensure the success of your implementation

Additional Pilot or Test Environments

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

Upgrade Flex

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

Cloud Production Environment Copy

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

Multi-region Multi-company Cloud Transactions

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

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

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

Life Sciences Cloud

The availability of critical business systems in the cloud improves your ability to compete. Cloud enables both business agility and the increased speed at which technology is delivered to better meet business needs for innovation. Additionally, the Kinetic Life Sciences Cloud solution provides the flexibility to support annual Kinetic upgrades in a heavily regulated space. The solution couples regulatory documentation with an upgrade cadence designed for Life Sciences and the need to meet the regulatory requirements.

U.S. Government Cloud for Aerospace & Defense

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



Secure Critical Business Systems with Reduced Effort

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

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

Epicor Security Suite for Hybrid and On Premises Deployments

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

- Epicor Secure Firewall Service
- SonicWall Capture Client Endpoint Protection
- Epicor Secure Backup
- Cellular ISP Failover

Application level security

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

Complete Security features also include:

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



We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com

This document is informational only. Epicor Software Corporation makes no guarantees, representations, or warranties to the information and disclaims, any implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. Testimonials are unique to the particular user and may vary. Epicor and the Epicor logo are trademarks of Epicor Software Corporation. Other trademarks are the property of their respective owners. Copyright © 2023 Epicor Software Corporation. All rights reserved. Rev. March, 2024.

