

Product

- ▶ Epicor® ERP

Benefits

- ▶ AI tool gives users instant access to information just by talking or texting
- ▶ NLP enables users to converse with EVA using their own words
- ▶ EVA is context-aware—user commands can be brief, and EVA will understand what they mean based on what was said before
- ▶ Quickly onboard new workers to ERP interaction with little or no training

Key Features

- ▶ The EVA app runs on Android™ or iOS™ devices and is free of charge. The EVA app also works in the Epicor Collaborate panel.
- ▶ Security is tied to ERP login ID and role—no separate logins required
- ▶ Simple system administration for EVA enablement and setup is done in Epicor ERP
- ▶ Text commands receive text responses from EVA
- ▶ Voice commands receive voice and text responses from EVA
- ▶ Adaptive cards with multiple button choices for suggested next actions are included in responses from EVA
- ▶ The EVA app Help menu lists skills available and sample tutorial scripts for conversing with EVA

Work Faster, Do More, and Provide Better Service

Epicor Virtual Agent (EVA) is intelligence personified. An artificial intelligence (AI) tool for your ERP system, its context-aware, natural language processing (NLP) allows users to interact with EVA just like they would with any other colleague—either by talking or texting. This makes the breadth and depth of the industry-specific functionality and information available inside the system directly accessible to a larger audience—boosting productivity and efficiency and giving your company an improved return on ERP investment. But that is just one aspect of EVA. More than just a chatbot, EVA returns richly formatted information with multiple button choices for suggested next actions.

EVA is powered in part by Microsoft® Azure® AI services—an affordable cloud solution that makes AI and cognitive technologies accessible and scalable for companies of all sizes. For Epicor users, the power of AI cannot be understated. Today's digital economy is influencing the growing demands of customers and B2B buyers for prompt, personalized service and rapid order fulfillment. To keep up, companies are increasingly turning to AI and cognitive technologies. EVA solves problems today and lays a strong foundation for intelligent technologies that integrate with an Epicor system. The natural synergy of EVA and Epicor ERP is underscored by a recent survey of 1,100 CTOs and line-of-business executives who concluded, "Enterprise software represents the most popular—and easiest—path to AI."¹

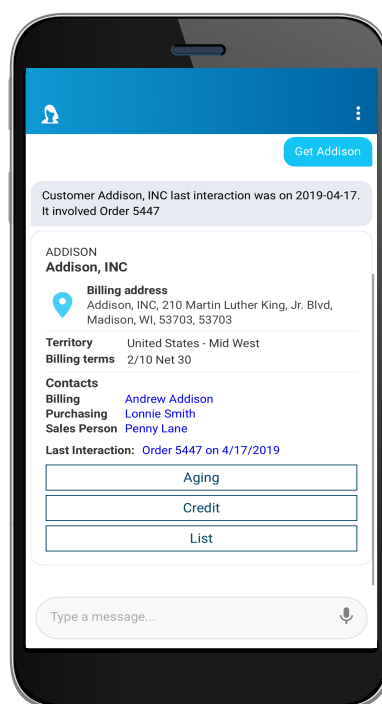


Figure 1. The request "Get Addison" returns information about the customer with suggested buttons for next actions.

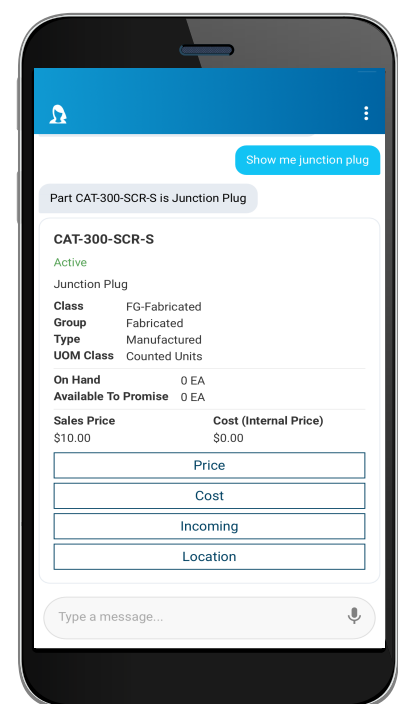


Figure 2. The request "Show me junction plug" returns information about the part.

¹ "State of AI in the Enterprise, 2nd Edition" by Jeff Loucks, Tom Davenport, and David Schatsky, Deloitte Insights, 22 October 2018. <https://www2.deloitte.com/insights/us/en/focus/cognitive-technologies/state-of-ai-and-intelligent-automation-in-business-survey.html>

How EVA Works

After your ERP system administrator has enabled EVA in your Epicor ERP solution, you can start using EVA—just launch the app on your device and start texting or talking. You can access parts, pricing, and other information. EVA initiates actions for you based on this information such as creating a simple quote or converting a quote to an order. When you finish your inquiries and are ready to act, either press a button, speak, or text—for example, “Create a quote for 20 of them.” Because EVA is aware of the conversation’s context, the application knows which item to quote.

EVA Skills

Skills define the tasks that EVA can accomplish in response to a voice or text query or command. An EVA skill consists of an intent (think of it as the verb) and an entity (think of it as the noun—the object of the verb). For example, in the skill “get Addison,” the intent is “get” and the entity is the customer, “Addison.” Thanks to the NLP inherent in EVA, there are multiple ways to state the intent and entity, such as saying “show me” or “display” instead of “get.”

EVA for Epicor ERP has these skills:

Parts

- ▶ Get general part details that display in an adaptive card layout
- ▶ Identify a bin or warehouse location
- ▶ Get details of a bin’s contents
- ▶ Gather a part’s on-hand quantity in a warehouse
- ▶ Get a part’s available-to-promise information for a certain date

Customers

- ▶ Get details for a customer’s primary contact
- ▶ Get customer details that display in an adaptive card layout
- ▶ Calculate the customer’s price for a part quantity

Suppliers

- ▶ Get supplier details that display in an adaptive card layout

Purchase orders

- ▶ Display a purchase order
- ▶ Create a single-line purchase order

Quotes

- ▶ Create a single-line quote
- ▶ Convert an entire quote to an order

Adaptive Card Functions

When you execute an EVA skill through voice or text, quite often the response from EVA is accompanied by an adaptive card with button choices for more functions. You can also see a listing of these adaptive card functions and access them when you type or say “help” in the EVA app.

Parts and inventory

- ▶ Examine contents of a specific warehouse bin for which parts it contains
- ▶ Adjust on-hand quantity of a part in a bin
- ▶ Calculate current on-hand and available-to-promise quantities for a part
- ▶ Check planned purchase orders for a given part
- ▶ Show which bins in a given warehouse contain a specified part
- ▶ Examine costs of a specified part
- ▶ Show general about a specific part
- ▶ Check which warehouses stock specified parts

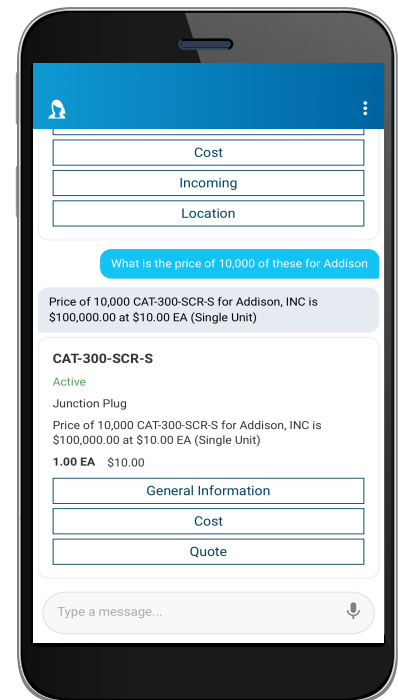


Figure 3. EVA returns the price breaks for the customer as requested.

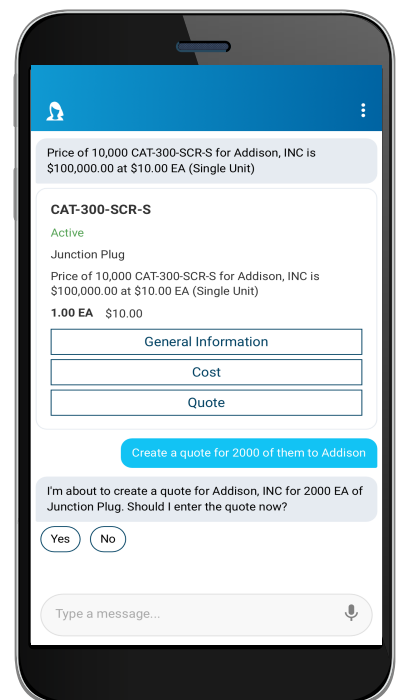


Figure 4. EVA can create a single-line quote after confirmation from the user.

Contacts

- ▶ Show general information about a specific contact

Customers and sales—quotes and orders

- ▶ Convert quotes to sales orders
- ▶ Create a single line/single release quote
- ▶ Show general information about a specific quote or order
- ▶ Remove credit hold for a specific order (authorized users)

Customers and sales—customers

- ▶ Show general information about a specific customer
- ▶ Show aging invoice summary for a specific customer
- ▶ Show credit info for a specific customer
- ▶ List orders for a specific customer
- ▶ List open quotes for a specific customer
- ▶ List invoices by age for a specific customer
- ▶ Show national account for a specific customer
- ▶ Calculate sales price for a given quantity of a part for customer

Suppliers and purchases—purchase orders

- ▶ Create a single line purchase order

- ▶ Approve a specific purchase order
- ▶ Show general information about a specific purchase order

Suppliers and purchases—suppliers

- ▶ Show general information for a specific supplier
- ▶ List open purchase orders for a specific supplier

RMA Skill

To continue strengthening the EVA capabilities, Epicor introduces new skills that enable you to create and submit a Return Material Authorization (RMA). Imagine your customer has a quality issue. You travel to the customer site to see the issue. With EVA, you can request an RMA for the customer, and she will return an RMA data card. Once you submit the RMA, the ERP system issues an RMA number back to EVA and sends it to the customer based on their contact in the ERP system.

App Requirements

- ▶ Epicor ERP version 10.2.400 or higher
- ▶ Release 10.2.500 or higher is required for purchase order skills, credit hold functions, and national account inquiry

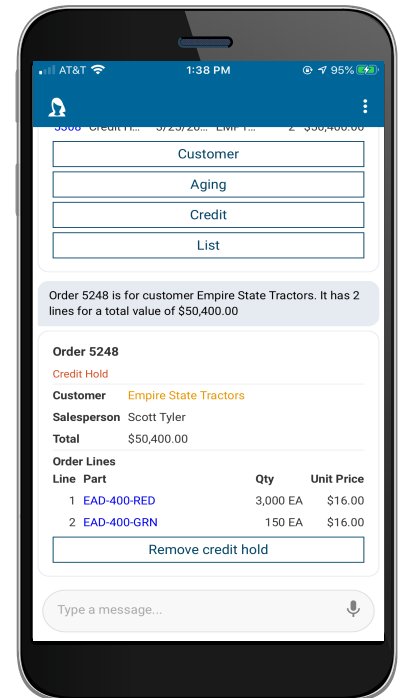


Figure 5. Authorized users can remove credit hold for an order via adaptive card.

- ▶ Release 10.2.600 or higher is required for RMA Skill and integration to Epicor Collaborate.
- ▶ Android™ or iOS™ mobile devices or a subscription for Epicor Collaborate
- ▶ EVA enabled in Epicor ERP by your system administrator
- ▶ Epicor ERP login ID and password
- ▶ The EVA app is available in The App Store and Google Play. EVA app usage is no charge.

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