

What's New in Kinetic

Version 2022.1

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What's New in This Release - Controlled Release Version

Here's a listing of new features and enhancements we rolled out with this release.



This is a controlled release version of this document. Some of the information constitutes forward looking information and is subject to change.

Epicor University

Help and Support Panel

Feature	Benefit
<p>Support for EpicCare Knowledge Base articles and videos</p> <p>You can now include results from Technical Support in your keyword searches. The support articles and videos have unique icons and upon their clicking, a user is redirected respective EpicCare location.</p> <p>This is an optional feature you enable on the Help and support center page.</p>	<p>Easier access to EpicCare information directly from Kinetic.</p>
<p>Epicor Ideas</p> <p>You can now access Epicor Ideas via the Help and Support panel. Use this platform to submit and vote on product ideas.</p>	<p>Users may provide product improvement ideas while working in the product.</p>

User Experience (UX) Transformation

Kinetic UX Applications

Feature	Benefit
<p>As we continue our phased rollout of the new user experience, we are now focusing on delivering forms based on key personas. In this release, we are rolling out applications for the</p>	<p>The new UX enables fast access to information with a modern clean layout, while simplifying everyday tasks.</p>

Feature	Benefit
following personas: <ul style="list-style-type: none"> • System Administrators • IT/Technical staff • Report Writers • Business Analysts 	

General User Experience (UX) Improvements

Feature	Benefit
<p>We're constantly working to improve your Kinetic experience, here's a summary of what has changed:</p> <ul style="list-style-type: none"> • Search chips - a context menu added allowing to copy the selected records into a clipboard. Likewise, you can use the paste insert function to quickly populate filters in reports and processes. • Attachments: <ul style="list-style-type: none"> • Common attachments such as pdfs and images can be displayed directly in a browser. • Added support for dragging and dropping multiple attachments into application tree nodes that support attachments. • Added support for dragging and dropping attachments at a page level. This approach uses epOnFileDragging & epOnFileDrop events, which can be hooked to any other action by Application Studio users utilizing this feature. • Grids: <ul style="list-style-type: none"> • By default, you can export 5,000 records to an Excel spreadsheet using the Export to Excel 	<p>The new UX enables fast access to information with a modern clean layout, while simplifying everyday tasks.</p>


Feature	Benefit
<p>functionality. This value can be overridden in Application Studio using the Number of pages to export setting (Grid Model > Export Excel Settings). You can set a maximum number of 20,000 records that can be exported in a grid (400 pages).</p> <ul style="list-style-type: none"> • Dashboard grids converted from ERP Classic to the new UI automatically include the “Full Screen” option. • Date picker and Token date controls - Application Studio users can specify a minimum and maximum date to restrict what date range may be entered. 	

ICE Framework Transformation

Feature	Benefit
<p>We're constantly working on transformation of ICE framework features that impact across all UIs. Here's a summary of what has changed:</p> <ul style="list-style-type: none"> • BPM HoldsBPM Holds - added an option to open, review and add new BPM Hold attachments in Kinetic applications using the context menu. If a Business Entity is associated with any hold, a visual indicator displays on the form. For example, you define criteria that place a customer on hold if the customer's state is blank. When you look at the customer in the Customer application, a Hold indicator displays. If you try to perform a transaction for the on hold customer, a slide out panel with an error message displays. • Searches: <ul style="list-style-type: none"> • Personalized search - all search panes allow you to save and re-use searches and filters you use frequently. You can also define the 	<p>The ICE Framework transformation helps customers migrate to a fully web based experience on the new Kinetic user interface.</p>

Feature	Benefit
<p>saved search as your default search.</p> <ul style="list-style-type: none"> • Predictive search - reduces time users spend on searching for a particular record. When you configure a field with predictive search, as you start typing in the field, the suggested results display in a floating tooltip window. The search results change dynamically as you type, which makes the searching easier and more efficient. • Data Tag search - allows you to search for records grouped by private or shared tags. The tags are unstructured text values that provide a way to associate otherwise unrelated records so that you or other users can search for them. • CRM/TE License modes - added support for alternate CRM and Time & Expense license login modes in the Kinetic ERP browser (ex: &licenseType=TE). • BAQ Zones BAQ Zones - added replacement feature for ICE BAQ Zones (aka Info Zones) for Kinetic applications. • Dashboards: <ul style="list-style-type: none"> • Image columns used in classic dashboards are converted to the new UI. • Added support for all available images list into Dashboards. • Added support for image view rules. • Configurator - added support for BAQ Type dynamic criteria. • Kinetic Translation Utility - added support from Kinetic screens. • Financial Report style - added 	

Feature	Benefit
<p>functionality to obtain results as a downloadable spreadsheet.</p> <ul style="list-style-type: none"> • User Settings: <ul style="list-style-type: none"> • You can now access and update your global settings directly from the User Settings panel anywhere in Kinetic. When you select it, an additional Global Settings panel slides out and you can update whether information such as User ID or Server displays at the top of the Kinetic window. • We also added a Clear ECM Account Cache button. When you press the button, it clears your account login information and you must login the next time to access an ECM document from Kinetic. • We added a Settings icon to each Application's page overflow menu. When you select the icon, a panel slides out and you can define update, delete, and undo settings for the application. • Kinetic BAQ Designer - available in the Preview mode that allows Kinetic customers familiarize with the new web-based design surface. Please be aware of the following limitations: <ul style="list-style-type: none"> • Updatable BAQs • External BAQs • Advanced GroupBy Editor <p>Full Kinetic BAQ Designer capabilities are coming in a later release.</p> <p>We appreciate your feedback! Please send us your suggestions and concerns using the</p>	

Feature	Benefit
<p>Preview Feedback button found on the BAQ Designer Home Page.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">  <p>For Business Activity Queries that are used in your production (live) environment, we recommend you build them in the Classic Designer, until the new designer is released for general use.</p> </div>	

Enhanced Browser and Data Sharing Experience

Feature	Benefit
<p>Users may use standard browser navigation capabilities as they navigate between pages and records, including browser refresh, history back/forward, and url sharing.</p> <p>As users navigate through a metafx application, the url dynamically updates including page, current record information (the full crumb bar selection), and context (company, site).</p> <p>The Share Share option is added to the main overflow menu on all pages, allowing users to spread the information using native OS sharing options.</p>	<p>Enhanced Kinetic user experience using standard browser controls and quick access to record sharing between users.</p>

Application Studio

Tooltips

Feature	Benefit
All Components and Events in Application Studio	Application Studio user can view information

Feature	Benefit
contain a Tooltip for each property. To display a description, hover over a property of your interest.	about each Component, Event and their properties so that they can more easily understand how to build customizations with Kinetic.

Decimal Support for Time Picker


Feature	Benefit
<p>The Time Picker component now has an Is Decimal property in the Advanced section. Select this property so end users can scroll through the time picker component to set the time to a specific decimal.</p> <p>Similarly in grids, users can now set specific decimal times. When users select a time column on a grid, the grid cell contains controls for selecting a specific decimal time, like 3:17. End users will see the time format and the system will translate the time into the decimal format.</p> <p>The Time Picker and the Date Picker components link to the same date/time value. Use the Time Picker to only change the time within the date/time value.</p> <p>Process Set Maintenance has the decimal time picker as well. Process sets can now start process runs during a specific decimal time.</p>	<p>Previously, it was difficult to manually enter specific times in the Time Picker component. Through this user interface change, you can select specific times like 6:14 and 7:08.</p> <p>Because the time in the Time Picker field causes the date/time to update in the Date Picker field, it ensures the correct decimal times saves with each date/time entry.</p> <p>This provides better ability to visualize and work with Time Picker components. End users can define and visualize the time in the hour format without having to calculate the correct decimal.</p>

Retrieve Default Search Options for Table

Feature	Benefit
Locate the default endpoint results for table names. When you search for a specific table, the system returns the default search name value for that table.	You can more quickly locate the names of tables that you need for reports and queries.


Service Management

Itemized Invoice for Field Service Jobs

Feature	Benefit
<p>When you generate field service invoices using the renamed Get Field Service Job functionality in AR Invoice Entry, each job that is ready to invoice creates a separate invoice.</p> <p>Each item on the field service job - material, labor, miscellaneous charges - creates a separate invoice line. However, during the Get Field Service Job process, the Summarize Labor and Material check box gives you the option to summarize all labor into one single invoice line, and all material into another single line.</p> <p>To review an example of how to generate field service jobs, review the Generating Field Service Invoices article.</p> <div style="background-color: #e6f2ff; padding: 10px; border-radius: 5px;"> <p> Before the 2022.1 release, the Get Field Service Call generated a single invoice for multiple jobs in a service call, and created an invoice line for each job.</p> <p>As of 2022.1, the Get Field Service Job functionality now generates a separate invoice for each job, and creates a separate invoice line for each item in the job - material or labor. Miscellaneous charges are still summarized on one invoice line, with a sub-list that shows each charge.</p> </div>	<p>Creating a separate invoice line for each item on a field service job enables you to apply different taxation rules to each line.</p>

Material Requirement Planning

Planning BOM Capability

Feature	Benefit
<p>When you create a part, you can set it to Planning BOM. You can then define all the possible material combinations when you create a method of manufacture for related finished good items.</p> <div data-bbox="162 562 719 892" style="background-color: #e0e0e0; padding: 10px; border: 1px solid #ccc;">  <p>To review an example how to use Planning BOM, review the Creating a Part article and locate the Concept of Planning BOM section located under the Entering General Part Details topic.</p> </div>	<p>You can plan lower level parts based on an overall quantity of a parent part and sub-assemblies, based on percentages rather than individual sold part numbers.</p>

Inventory Management

Reuse Dynamic Attributes

Feature	Benefit
<p>The Dynamic Attribute Master app allows you to create attributes that you can link to a dynamic attribute class you are creating. Therefore, you are able to link the master record that holds attributes to any dynamic attribute class you want to create. In other words, you can reuse them.</p>	<p>You don't need to create attributes from scratch but reuse them if necessary.</p>


Duplicate Dynamic Attribute Class

Feature	Benefit
<p>You can duplicate a dynamic attribute class and create a new entry that is identical to the original record.</p>	<p>You can use existing dynamic attribute class records with attributes rather than creating new ones from scratch.</p>

Feature	Benefit
When you duplicate a dynamic attribute class, all the attributes that belong to that class are copied with it.	

Production Management

Recipe Authoring

Feature	Benefit
<p>Using the Recipe Entry app, you can add a recipe indicating the developmental requirements of an item you want to produce. Recipes generally include a specification about gathering and combining raw material, the type of equipment used, and the procedures you must follow to create the final product.</p> <p>A recipe includes:</p> <ul style="list-style-type: none"> • Formulas that define the relationships of material resources, including products, ingredients, and by-products. • Routings that define the relationships of non-material resources, including labor and equipment operations with activities and their associated resource. • Processing tasks that encompass the work instructions needed to produce the products. <div data-bbox="162 1449 714 1659" style="background-color: #e0e0e0; padding: 10px; border-radius: 5px;"> <p> For more information about Recipe Authoring, refer to the Working with Recipe Authoring article.</p> </div>	<p>You can now author Recipes in Kinetic by creating portable, reusable master recipes which you can then execute at various sites later.</p>


Configurator Management

Production Mode

Feature	Benefit
<p>The mode deploys the EWC configurator, which makes the files more lightweight.</p> <p>The use of the Production Mode is recommended when the configurator is ready to be moved to production and you complete all the required changes and testing.</p>	<p>Improves the loading time of the EWC configurator.</p>

Sales Management

CPQ Integration for Orders and Jobs

Feature	Benefit
<p>In this release, you can use CPQ Configurator for sales orders and jobs.</p> <p>CPQ is a flexible SaaS platform that orchestrates your sales to manufacturing process. It provides simple and powerful administration, rules development, visual configuration, quoting, and dynamic pricing in one complete cloud offering.</p> <p>Combining CPQ with Kinetic helps deliver a visual & enhanced buying experience.</p> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 10px; margin-top: 10px;">  <p>Epicor Commerce Connect (ECC) now supports order generation for CPQ parts.</p> </div> <p>For more information, refer to Working with CPQ Configurator.</p>	<ul style="list-style-type: none"> • Enables you to configure orders and jobs in Kinetic using a configurator designed in CPQ. • A centralized data hub that can be managed in a single application.
<p>All KBMax references were renamed to the new CPQ product name.</p>	

Automated Order Fulfillment

Feature	Benefit
<p>You can auto-allocate a sales order or its releases from within the Order Entry app without the need to use the Fulfillment Workbench. You then process the allocated sales order releases through the Allocation Queue Process.</p> <p>For more information, refer to Setting Up Automated Sales Order Fulfillment and Auto Allocating Sales Orders.</p>	<p>You don't have to manually fulfill sales orders using the Fulfillment Workbench.</p>
<p>You can set up BPM to automatically send sales order releases or entire sales order to the allocation queue.</p>	<p>You don't have to manually execute the Allocation Queue Actions function for order release(s) or an entire order.</p>

Financial Management

AP Invoice - Get Late Costs Automation

Feature	Benefit
<p>You now have the option to automatically transfer all late costs related to a container shipment or purchase receipt to the AP Invoice, removing additional manual work and the time that you spend creating an invoice.</p>	<p>You no longer have to manually copy late costs one by one to an AP Invoice. You can now select one, many or all landed costs for multiple containers and receipts. This gives you a better visibility of all landed costs.</p>

System Management and Framework Tools

Document Management

Feature	Benefit
<p>Dynamic Documents</p> <p>Dynamic Documents are flexible forms you design to drive business flows. The information you need on these forms is unique to your industry, products, and services. Available through a separate license, you develop documents through</p>	<p>Design templates which contain fields and actions for a business flow. For example, you can create a document that contains production instructions for a complex job operation. This document details the steps that shop</p>

Feature	Benefit
<p>a Microsoft Word plug-in. These documents convert automatically into .pdf forms. The forms are then available for data entry and publishing in Kinetic applications.</p> <p>For more information, reviewing the Using Dynamic Documents article.</p>	<p>floor workers must follow to complete the operation.</p>
<p>Local File Attachments</p> <p>Now while using the Kinetic cloud browser, you can attach files to records from your local network file system. This restores the local file attachment function from the Classic system.</p> <p>For more information, review the Attaching Local Files to Browser Records article.</p>	<p>Previously to attach files in the Kinetic Cloud browser, you needed to switch to an ECM or another attachment type.</p>

Dynamic Reports

Feature	Benefit
<p>Dynamic reports, like the Tax Validation Report, can contain different criteria for determining what displays when these reports generate. The criteria sets can contain different prompts and filters.</p> <p>Create these criteria sets within Report Data Definition and then define the styles which use these different criteria sets within Report Style Maintenance. You can also create a new form for the report which you then attach to the system using Menu Maintenance.</p> <p>Require Submission ID and Allow Multiple Submits check boxes were added to the Electronic Report card in Report Style Maintenance. When you submit a report, it associates with an ID. If you select a Require Submission ID, end users must enter a submission ID to print the report.</p>	<p>Defines the different criteria you need for dynamic reports. You can then generate reports using these different criteria options to display the information you need in the report output.</p> <p>If you switch IDs, you do not have to manually submission parameters each time you submit a report, which saves time. This ensures a standardized way of printing a set of reports.</p>

.NET 6 Migration

Feature	Benefit
<p>Kinetic 2022.1 is adopting the .NET 6 runtime for server-side processing. .NET 6 is Microsoft’s latest version of the .NET environment and includes numerous benefits and updates, but it may introduce breaking changes.</p> <p>The following .NET 6 migration changes potentially impact both Cloud and On Premise customers:</p> <ul style="list-style-type: none"> • With HTTPS as the standard protocol, certificates are now required for all servers • Kinetic no longer uses the Windows Communication Foundation (WCF) framework to manage service calls between the server, clients, and web applications. The system uses ASP.NET Web API instead. • The .NET 6 runtime is not compatible with software compiled for the .NET Framework. If your serverside customizations use direct dll references to Kinetic or third-party dlls files, they will require review and a possible update. <p>These .NET 6 migration changes impact only On Premise customers:</p> <ul style="list-style-type: none"> • Machines used for the Kinetic Administration Console and Application Server must have the latest .NET 6.0 SDK and ASP.NET Core Runtime 6.0 (Hosting Bundle) installed. • We moved the Enterprise Search service to ASP.NET Core (NET 6), so the Enterprise Search standalone site is not available. <p>For more information, refer to the Kinetic 2022.1 Upgrade Guide.</p>	<p>Remaining current with foundational technologies.</p>


No Longer Supported

Feature	Benefit
<p>Epicor Portal Server</p> <p>Epicor Portal Server has reached end of life and it will not be included in the Kinetic 2022.1 release going forward.</p> <p>Justification</p> <ul style="list-style-type: none"> • Epicor Portal Server license SKU has already been removed from the price list. • If you are a Kinetic Cloud user, you will no longer be able to use this product and the maintenance line item will be removed from their invoices. • If you are an existing on-premise user using Epicor ERP/Kinetic that is 2021.2 and lower, then you continue to be supported but only if you hold a valid license. <p>Migration Path</p> <ul style="list-style-type: none"> • If you are using Kinetic in the browser then you can accomplish the same functionality using data services (REST). This functionality is now available as part of the base framework of Kinetic and does not require any additional license functionality. 	None
<p>SharePoint Publisher</p> <p>Starting with the Kinetic 2022.1 release, SharePoint Publisher is no longer supported.</p>	None
<p>Epicor Secure Data Manager (ESDM)</p> <p>Epicor Secure Data Manager (ESDM) has reached end of life and it will not be included in the Kinetic 2022.1 release going forward.</p>	None

No Longer Supported - Future Releases

Feature	Benefit
<p>Epicor Web Access</p> <p>Epicor Web Access (EWA) will no longer be supported starting with the Kinetic 2022.2 release. Please transition away from using Epicor Web Access.</p>	
<p>Epicor Tax Connect TLS 1.0/1.1 Data Connections</p> <p>Epicor Tax Connect TLS 1.0 and the 1.1 data connections will no longer be supported starting December 2022. Please upgrade to the current version of Epicor Tax Connect.</p>	
<p>Classic and Modern Shell</p> <p>The Classic and Modern Shell user interfaces will move to sustaining status starting in the Kinetic 2023.1 release.</p> <p>Then starting with the Kinetic 2024.1 release, both interfaces will no longer be included in the system.</p>	

Embed Kinetic Apps and EDD Charts in SharePoint

Feature	Benefit
<p>You can create page links directly from within the SharePoint site allowing you to directly access Kinetic apps and EDD Charts.</p> <div data-bbox="162 1465 719 1715" style="border: 1px solid #ccc; border-radius: 10px; padding: 10px; background-color: #f0f0f0;"> <p> For information on how to create page links, refer to the Embedding Kinetic Apps and EDD Charts in SharePoint article in the Kinetic help.</p> </div>	<p>You can access Kinetic apps and EDD charts directly from the SharePoint site.</p>


Extension and Companion Apps

Collaborate

Feature	Benefit
You can send/receive attachments between a Collaborate group and a Microsoft® Teams channel. Supported file types include Word, Excel, PowerPoint and PDF, as well as images.	Share data between Collaborate and Microsoft Teams

Country Specific Functionality

Periodic Average Costing

Feature	Benefit
<p>Periodic Average Costing</p> <p>This feature represents the average cost method calculations that are carried out at the end of the accounting period with weighted average cost based on the cost of the beginning inventory and all the purchases made during that period.</p> <p>This feature is available in China, Taiwan, Thailand, Vietnam, Malaysia, Indonesia and Singapore</p> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 10px; margin-top: 10px;">  You can use this functionality only if you have PAC license installed. </div>	<p>Periodic Average Costing gives you a costing method required by many APAC markets. You can now calculate the average cost per period, reducing the effect of fluctuations, and reallocating the cost between cost of sales and inventory accounts.</p>

Enhanced Intrastat Reporting

Feature	Benefit
<p>Enhanced Intrastat Reporting</p> <p>The primary country of origin you select in Shipment Entry displays in both Intrastat reports. The value is picked up hierarchically: at first from</p>	<p>This feature ensures that correct country of origin appears in the existing Intrastat reports.</p>

Feature	Benefit
Shipment Entry, then, if not found there, from Part maintenance.	

Saudi Arabia

Feature	Benefit
<p>Electronic Invoicing</p> <p>You can generate and send electronic AR invoices in Saudi Arabia CSF. The common e-invoicing standard used in Australia is Peppol, which is an internationally established standard that allows invoice exchange between different accounting systems.</p>	E-invoicing benefits every business by simplifying and automating the exchange and processing of invoices. It helps make invoice processing easier and cheaper. It is direct, secure and available for every business.

United Kingdom

Feature	Benefit
<p>Generating Payment Files for Major UK Banks</p> <p>You can export payment entries into a file format according to the payment standards provided by major UK banks. The following formats are supported:</p> <ul style="list-style-type: none"> • Barclays – SAGE • Barclays – BACS • HSBC - Standard 18 • HSBC - SEPA PAIN.001.001.03 XML • HSBC - SEPA XML Interface 	This feature expands the number of supported payment formats providing you with flexibility to use the bank of your choice.
<p>Generating the CIS Monthly Return Report</p> <p>In this release, a new field is added in Company Configuration that helps in differentiating the CIS Reporting - Production and Test Mode.</p>	The CIS Monthly Return Report is a legal report which is submitted to the tax authorities (HMRC). The HMRC will now have two options; when the Test Mode is ON, the xml indicates as <Gateway Test>1 and if the Test Mode is unchecked, the xml indicates as <Gateway Test>.

Indonesia

Feature	Benefit
<p>Withholding Tax Payment Status</p> <p>You can use the Withholding Tax Payment Status ID to maintain and update WHT status, paid date, reference, and NTPN for the withholding tax.</p>	<p>This feature helps in the generation of withholding tax which helps in an early revenue generation.</p>
<p>Setting up E-Faktur Numbers</p> <p>You can use E-Faktur Number Maintenance to setup e-Faktur Number obtained from government.</p> <p>Processing E-Faktur Numbers</p> <p>You can use E-Faktur Number Processing to retrieve VAT, assign e-Faktur number, generate CSV File, and update uploaded status.</p> <p>Processing QR Code Scan Entry</p> <p>You can use QR Code Scan Entry to scan QR Code for e-Faktur documents from supplier.</p>	<p>This feature helps in detecting potential tax violation related to the VAT administration. It also supports regulation and standardization of tax invoice data.</p>

Poland

Feature	Benefit
<p>Generating JPK V7M - VAT Declaration Report</p> <p>You can use the VAT Tax Report app to generate, review, print, and post the JPK_V7M Report. The report allows you to verify amounts entered in the Tax Box Report Summary Adjustment app.</p>	<p>The report you generate automatically displays all the VAT amounts levied during a fiscal period that you select, for specified customers, suppliers, tax liability codes, tax type codes, report category codes and tax jurisdiction codes.</p>

Thailand

Feature	Benefit
<p>Posted Payment Update</p>	<p>You can update a posted payment transaction</p>

Feature	Benefit
You can adjust the withholding tax data related to posted AP payments using the Posted Payment Update TH app.	when you receive an invoice from your supplier.

Norway

Feature	Benefit
<p>Electronic VAT Return Report</p> <p>You can now create a VAT Return report in the XML format and submit the declaration information to the government.</p>	You can summarize a company's eligible VAT transactions over a specified accounting period helping the company complete their VAT return.

Netherlands

Feature	Benefit
<p>International Trade Statistical Declarations</p> <p>You can generate import files with Intra/Extra Trade information to upload them to Statistics Netherlands.</p>	This feature helps companies submit their declarations for International trade in goods statistics by using IDEP+ declaration module made available by Statistics Netherlands.