

# Epicor Virtual Agent

Simplify and automate with Epicor Virtual Agent (EVA). EVA can answer questions about your data with helpful links, and perform routine tasks to save you time and effort.

## Work Faster, Do More, and Provide Better Service

Epicor Virtual Agent (EVA) is intelligence personified. An artificial intelligence (AI) powered tool for your Kinetic system (the new name for Epicor ERP), 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 Kinetic is underscored by a survey of 1,100 CTOs and line-of-business executives who concluded, “Enterprise software represents the most popular—and easiest—path to AI.”



Kinetic

### Benefits

AI powered tool gives users instant access to Kinetic 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 Kinetic interaction with little or no training

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>

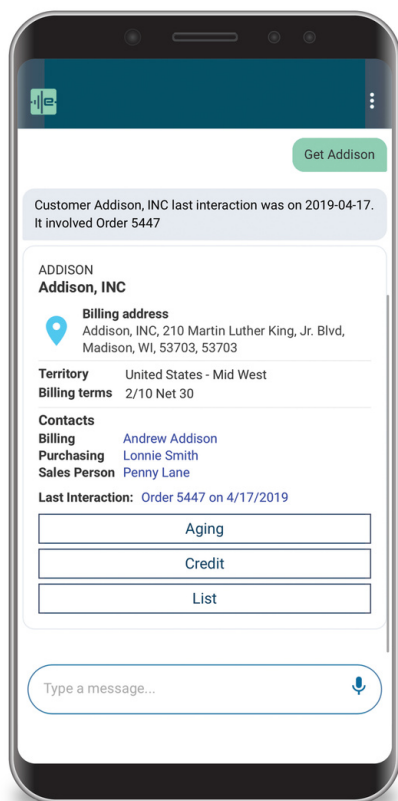


Figure 1. The request “Get Addison” returns information about the customer with suggested buttons for next actions.

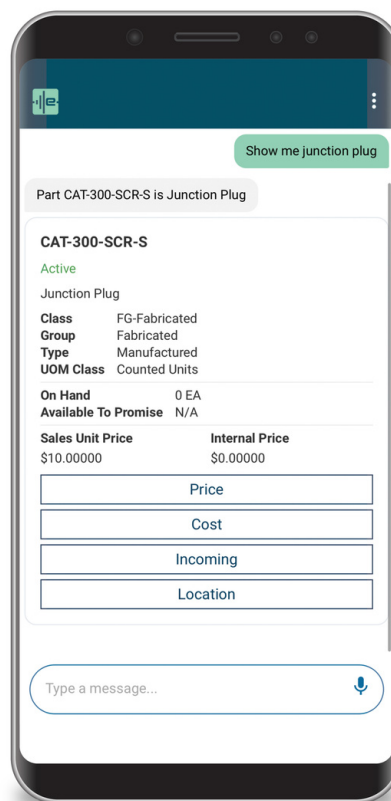


Figure 2. The request “Show me junction plug” returns information about the part.

## How EVA Works

After your system administrator has enabled EVA in your Kinetic 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

## Contacts

- Show general information about a specific contact

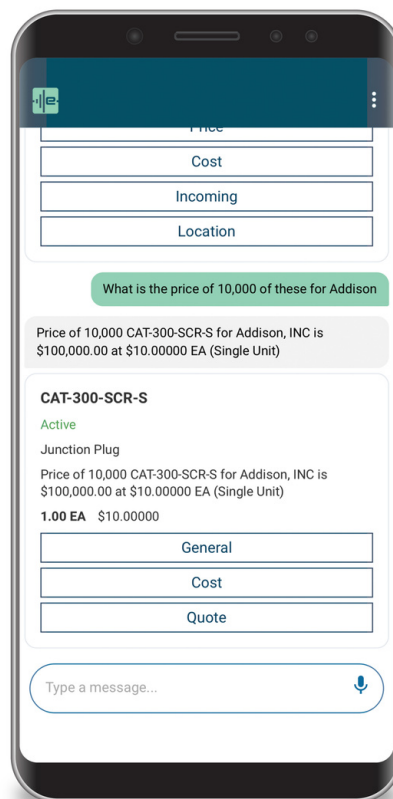


Figure 3. EVA returns the price breaks for the customer as requested.

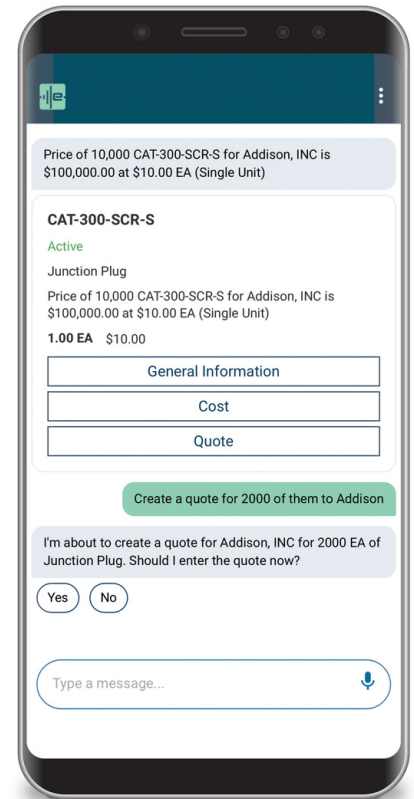


Figure 4. EVA can create a single-line quote after confirmation from the user.

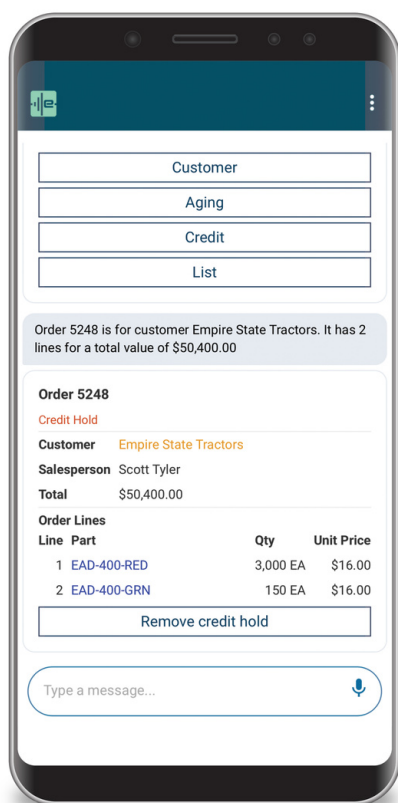


Figure 5. Authorized users can remove credit hold for an order via adaptive card.

## 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

## Customers and sales—customers

- 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

## Additional Skills and Features

To continue strengthening EVA capabilities, Epicor introduced additional skills and features in more recent releases of Kinetic.

### RMA Skills

New EVA skills 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 EVA will return an RMA data card. Once you submit the RMA, Kinetic issues an RMA back to EVA and sends it to the customer.

### Task Skills

As business processes become more complex and dynamic, any enterprise application needs to help keep the ball moving forward systematically, whether it is a sales opportunity or an engineering project. Task Management available within Kinetic enables you to manage and automate even the most complex business processes—not to mention paving the way to ISO certification. EVA skills for Task Management let your users easily view and create tasks anywhere—at their desk or in the field—using voice or text commands, such as:

- Display my schedule for today
- What are my current tasks
- Display upcoming tasks (current week)
- Display my outstanding tasks
- Create a new task
- Create a new task for [user ID]
- Create a task of [Task] for [user ID]
- Add a task of [Task] for [user ID]
- Add a task of [Task] with type [Type] for [user ID]

### Sales Order Skills

Sales Order Skills allow users to go straight to a specific sales order and release line with a voice or text command. An information card allows drill-down into a specific release line or you can do the same with a release line skill as shown in these examples:

- Show me order y (displays new information card with release line drill-down)
- Display line x from order y
- Show me line x from order y

- List line x from order y
- Show line x (when a sales order is in context of conversation)
- Display line x when a sales order is in context of conversation)
- List line x (In context of conversation of order)

## Email Button

After you have asked EVA to create a single-line quote, an RMA, or a single-line purchase order, an email button is available for you to send the form to your contact right then and there. You can also use information card functions to select a sales order or AR invoice and email those too.

## App Requirements

- Kinetic 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
- Release 10.2.600 or higher is required for RMA Skill and integration to Epicor Collaborate.
- Release 10.2.700 or higher is required for Task Skills, Sales Order Skills, and email button.
- Android™ or iOS™ mobile devices or a subscription for Epicor Collaborate
- EVA enabled in Kinetic by your system administrator
- Kinetic login ID and password
- The Epicor Virtual Agent app is available in The App Store and Google Play.



## 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 Kinetic
- 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

## EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

Contact Us Today: [info@epicor.com](mailto:info@epicor.com) | [www.epicor.com](http://www.epicor.com)

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations, or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. This document and its contents, including the viewpoints, testimonials, dates, and functional content expressed herein are believed to be accurate as of its date of publication, June 30, 2021. Use of Epicor products and services are subject to a master customer or similar agreement. Usage of the solution(s) described in this document with other Epicor software or third-party products may require the purchase of licenses for such other products. Epicor and the Epicor logo are trademarks or registered trademarks of Epicor Software Corporation in the United States, and in certain other countries and/or the EU. Microsoft and Azure are either registered trademarks or trademarks of Microsoft Corporation. iOS is a trademark or registered trademark of Cisco in the U.S. and other countries and is used under license. Android is a trademark of Google LLC. All other marks are owned by their respective owners. Copyright © 2021 Epicor Software Corporation. All rights reserved.