

Getting Ready for your Epicor Financial Planner Cloud

We are happy that you've decided to purchase Epicor EFP Cloud. Depending on your ERP system the preparations for the setup are slightly different.

Epicor ERP - SaaS edition

EFP will connect to your ERP system using the built-in REST API. To get this started - please send the following information

Company & Contact

Company Name in Full Epicor Site ID Starting Month of Financial Year

Start Year for Historical Data Entities and books to be loaded

Priority Order for Entities to Load Master Data Entity that holds Currency Rates

Existing ERP Budget Scenarios Your E-Mail Address * Business Contact E-Mail Technical Contact E-Mail

REST Connection Data
URL (REST Connection)

URL to REST connection endpoint, example: https://<server>.epicorsaas.com/<service>/api/v1. If you don't know this - please raise a Support ticket with Epicor Support and ask.

Epicor User ID Password to be used for connection

Epicor User ID & Password to be used for connection

Please fill all the letters into the box to prove you're human. this field empty:



Please keep this field empty

Submit Query

Epicor ERP (E10), Enterprise (E7), iScala - On-premise edition

You will use EFP OnPrem connector or REST service depending on Epicor Version.

Fill in the information below and we will send you further instructions:

Company & Contact

Epicor Version and Build number * Epicor Site ID Your E-Mail Address *

Business Contact E-Mail Technical Contact E-Mail ERP System

*

Please fill all the letters into the box to prove you're human.



Please keep this field empty

this field empty:

Submit Query

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Last update: **2019/11/08 14:31**

