

Epicor Brochure

GDPR Response

Responding to Individual
Rights Requests under
GDPR with Epicor Kinetic

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Introduction

This document is intended to provide solution level guidance and instruction to help you as an Epicor Customer fully utilize the Epicor Software in addressing your obligations under the UK and EU versions of UK and EU GDPR. The information contained herein is a concise and simplified guide for organizations, is not exhaustive and is for general guidance only. It should not be relied upon as legal advice or to determine how the UK and EU GDPR might apply to you and your company. We encourage you to work with a legally qualified professional to review the UK and EU GDPR, how it applies, if at all to your organization, and how to help ensure your ongoing compliance. If you would like more detailed and authoritative information about the UK and EU GDPR and its respective requirements, please visit:

For EU GDPR [click here](#).

For UK GDPR [click here](#).

Personal Data held in Epicor Kinetic

Due to the nature of the ERP systems, the data records, including Personal Data (as defined by the UK and EU GDPR), are stored in many entities, tables and fields spread across the entire application.

Epicor ERP stores individual information against the following key entities:

- Epicor Users
- Person / Contact
- Employees
- Payroll Employees
- Customer Contacts
- Supplier Contacts
- Work Force
- Buyers

For each of these entities, the amount and type of Personal Data varies based on functions configuration and implementation of functional areas of the product.

The potential Personal Data stored in Epicor ERP includes but it is not limited to the following:

- Name, Middle Name and Last Names
- Birthday
- Social Security Number / Tax ID
- Personal Address
- Bank Account information
- Phone, Mobile Phone, Home Phone, Pager and Fax
- Individual Photos
- Email, Website, IM, Twitter®, LinkedIn® and Facebook®

Request for Access

Pursuant to the UK and EU GDPR, UK and EU individuals have the right to know if their Personal Data is being processed and stored, and if it is, then the individual has the right to request information on how their Personal Data is processed and stored. The information must be provided to the individual in a way that is clear and understandable. This type of request is also known as “Access Request”.

Options available in Epicor Kinetic to support this type of request.

Personal data information is stored and maintained using the standard entry screens in Epicor Kinetic. Companies can process a “Request for Access” petition by searching the name of the individual on each one of those entry screens or by creating Business Activity Queries to the tables holding the personal information.

Epicor Users

Navigate to: System Setup / Security Maintenance / User Account Security

Search for: User Name

Review: Personal Information

The screenshot displays the 'User Account Maintenance' interface in Epicor Kinetic. The top navigation bar includes a search field with 'Clarence Tweed' and a dropdown menu. The main content area is divided into several sections:

- User Information:** Fields for Name (Clarence Tweed), Address (Main street 221), City (London), State/Prov, Postal Code (WW1 5SE), Country (United Kingdom), Office Phone (01287 790090), Phone (07844 6790009), E-mail (ctweed@epicor.com), Language (English/United Kingdom), Format Culture (Invariant Language (Invariant Country)), Domain, Domain User ID, External Identity (charles.tweed), Access Scope, and Integration Account.
- Account Settings:** Includes 'Require Single Sign-On' (checkbox), 'License Timeout Minutes' (15), and 'Client Start Menu ID'.
- Account Actions:** Features buttons for 'Expire Password' and 'Reset Password', along with fields for 'Date Last Used', 'Password Last Changed', 'Password Expires' (15/05/2020), 'Password Expires Days' (0), 'Locked Out' (checkbox), 'Locked Out Until', and 'Consecutive Logon Failures' (0).
- ERP:** Includes 'Allow Requisitions' (checkbox), 'Advanced Configurator' (checkbox), 'Shop Tracker Refresh Minutes' (10), 'Mobile Password' field, and a 'Change Mobile Password' button.

Person / Contact

- Navigate to:

Sales Management / Order Management / Setup / Person – Contact
- Search for:

Person Name
- Review:

Personal Information
- Links grid will show how the Person Contact information is used in other roles. Photo is shown under the Photo tab. More information is shown under the Web Links tab.

Person Contact Maintenance

Andrew Addison

Person Contact

Andrew Addison

Person/Contact: 1 Andrew Addison

Global ☐ Global Lock ☐

Function: VP

Role: Vice President

Title: Vice President

Reports To:

Email: andrewa@epicorsystems.com

User: User ID:

Address

Company Name: Addison, INC

Address: 210 Martin Luther King, Jr. Blvd

City: Madison

State: WI

Postal Code: 53703

Country: USA

Phone / Fax

Phone: 608-555-5556

Cell Phone:

Fax: 608-555-5566

Pager:

Home:

Alternate: 608-347-8388

Person Contact Link List

Contact Link	Primary Contact	Cust. ID	Cust. Name	Ship To	Ship To Name	Cust. Contact Name	Supplier ID	Supplier Name	Purchase Point	Purchase Point Name	Supplier Contact Name
Customer	<input checked="" type="checkbox"/>	600000000	Addison, Inc			Andrew Addison					

Employees

- Navigate to:

Financial Management / Payroll / Setup / Payroll Employee
- Search for:

Employee Name
- Review:

Personal Information and Employee Photo

Payroll Employee Maintenance

Employee

John J Labor

ID: 100 SSN: 477-99-6589

Person / Contact: 42 John J Labor

Name: John J Labor

Address: 123 First Avenue

City:

State/Prov: Chicago, IL

Postal Code: 60646

Country: USA

Phone:

Birthday: 01/04/1965

Email: jhlabor@cox.net

Payroll Class:

Hired: 10/06/2007

Terminated: ☐ Date:

Inactive: ☐

Emergency Contact

Contact: Marie Labor

Phone: 312-749-8378

Employee Photo

Image Name: M105

Supervisor: 105 David A Cook

User ID: epicor Epicor System Admin

Roles

Sync Name: ☒ Sync Address: ☒

Sync Phone: ☒ Sync Email: ☒

Payroll Employees

- Navigate to:

Sales Management / Customer Relationship Management / Setup / Person – Contact
- Search for:

Person Name
- Review:

Personal Information

Links grid will show how the Person Contact information is used in other roles. Photo is shown under the Photo tab. Look for bank account information under the deductions tab.

Person Contact Maintenance

Person Contact

Andrew Addison

Detail

List

Name Details

Photo

Web Links

Comments

Links

Contact Information

Person/Contact: 1 Andrew Addison

Global ☐

Global Lock ☐

Function: VP

Role: Vice President

Title: Vice President

Reports To:

Email: andrewa@epicor.com

User: User ID:

Address

Company Name: Addison, INC

Address: 210 Martin Luther King, Jr. Blvd

City: Madison

State: WI

Postal Code: 53703

Country: USA

Phone / Fax

Phone: 608-555-5556

Cell Phone:

Fax: 608-555-5566

Pager:

Home:

Alternate: 608-347-8388

Person Contact Link List

Contact Link	Primary Contact	Cust. ID	Cust. Name	Ship To	Ship To Name	Cust. Contact Name	Supplier ID	Supplier Name	Purchase Plant	Purchase Plant Name	Supplier Contact Name
Customer	<input checked="" type="checkbox"/>	ADDISON	Addison, Inc			Andrew Addison					

Customer Contacts

- Navigate to:

Sales Management / Order Management / Setup / Customer
- Tabs:

Contacts and Ship To / Contacts
- Review:

Personal Information

More information is shown under the Web Links tab.

Customer - ADDISON - Contacts

Customer ADDISON - Contact Andrew Addison

Global

Activity

Details

Details

Customer Detail

Billing

Contacts

Detail

By Ship To

Detail

Contacts

Detail

Price Lists

Discount Price Lists

Documents

Detail

Industry Classes

Detail

Mobile

Detail

Manifest Info

Billing

Detail

Quantum View

Documents

Detail

Tax Exemptions

Detail

Banks

Detail

Industry Classes

Detail

Managed Suppliers

Detail

Mandates

Detail

Search Cross-References

Contact Information

Person/Contact ID: 76

Person/Contact Name: Andrew Addison

Name: Andrew Addison

Function:

Role: Vice President

Title: Vice President

Reports To:

Phone / Fax / Email

Phone: 608-555-5556

Cell Phone:

Fax: 608-555-5566

Pager:

Home:

Alternate:

Email: andrewa@epicor.com

Primary Contact

☒ Billing

☐ Purchasing

☐ Shipping

Commerce Connect

☐ Web User

Status

☐ No Contact

☐ Inactive

Sync

☒ Sync Name

☒ Sync Address

☒ Sync Phone

☒ Sync Email

☒ Sync Links

Mailing Address

Name Detail

Comments

WebLinks

Supplier Contacts

- Navigate to:

Material Management / Purchase Management / Setup / Supplier
- Tabs:

Contacts and Purchase Points / Contacts
- Review:

Personal Information

More information is shown under the Web Links tab.

Suppliers > ABCM > Contacts >

Supplier ABCM - Contact 109

Contact 1 of 1 < 109 >

Feedback

Details

Details

Search Cross-References

Purchase Points

Purchase Point

Contacts

Contact

Manifest Info

Billing

Billing Details

Quantum View

Contacts

Contact

Banks/Remits

GL Control

Tax Exemptions

Manifest Info

Billing

Billing Details

Quantum View

Detail

Contact Information

Contact ID

109

Contact Name

Alan McInnes

Name *

Alan McInnes

Function

Customer Service

Role

Customer Service

Title

CSR

Reports To

Email

alan@epicorusa.americas.epicor.net

Phone / Fax

Phone

773-567-9077

Cell Phone

773-567-6754

Fax

773-567-9075

Status

No Contact

Inactive

Primary Contact

Sync

Sync Name

Sync Phone

Sync Email

Sync Links

Pager

Home

Alternate

Commerce Connect

Workforce

Navigate to:

Sales Management / Order Management / Setup / Work Force

Search for:

Person Name

Review:

Personal Information

More information is shown under the Web Links tab.

Work Force Maintenance >

Work Force TYLER

Details

Feedback

Details

Work Force Information

Work Force ID *

TYLER

Person Contact ID

39

Person Contact Name

Scott Tyler

Name *

Scott Tyler

Role

Sales Person

Reports To

Penny Lane

Title

Address

Address

City

State/Prov

Postal Code

Country

USA

Communications

Person

ADD

Inactive

Inactive

Send Alert

View all Territories

View Company Pipeline

Sync

Sync Name

Sync Address

Sync Phone

Sync Email

Sync Links

Phone/Fax

Business

Home

Mobile

Pager

Fax

Email

Invoice

Invoice

Payment

Buyers

- Navigate to:

Material Management / Purchase Management / Setup / Buyer
- Search for:

Buyer Name
- Review:

Personal Information

Buyer Maintenance

Buyer HLOW

Details

Details

Buyer *

HLOW

PerCon ID

25

Name *

Howard Low

PO Limit

£ 10,000.00

Approval Person

Melroy Crabtree

Email Address

☐ Consolidated Purchasing

☒ System Default

☐ Inactive

☒ Sync Name

☒ Sync Email

Authorized Users

Companies can also create Business Activity Queries (BAQ's), Dashboards and reports to review and validate personal information. The database tables that should be used as the source of those tools are as follows.

Entity	Table
Epicor Users	Erp.UserFile
Person / Contact	Erp.PerCon
Person / Contact Links	Erp.PerConLnk
Employees	Erp.EmpBasic
Payroll Employees	Erp.PREmpMas
Customer Contacts	Erp.CustCnt
Supplier Contacts	Erp.VendCnt
Work Force	Erp.SalesRep
Buyers	Erp.PurAgent

Request for Correction

Pursuant to the UK and EU GDPR, UK and EU individuals may request the correction of incorrect Personal Data. These types of request are commonly referred to as “Requests for Correction” or “Requests for Rectification”.

Options available in Epicor Kinetic to support this type of request.

Companies can process a “Request for Correction” petition by updating the records using the standard entry screens.

Request for Deletion

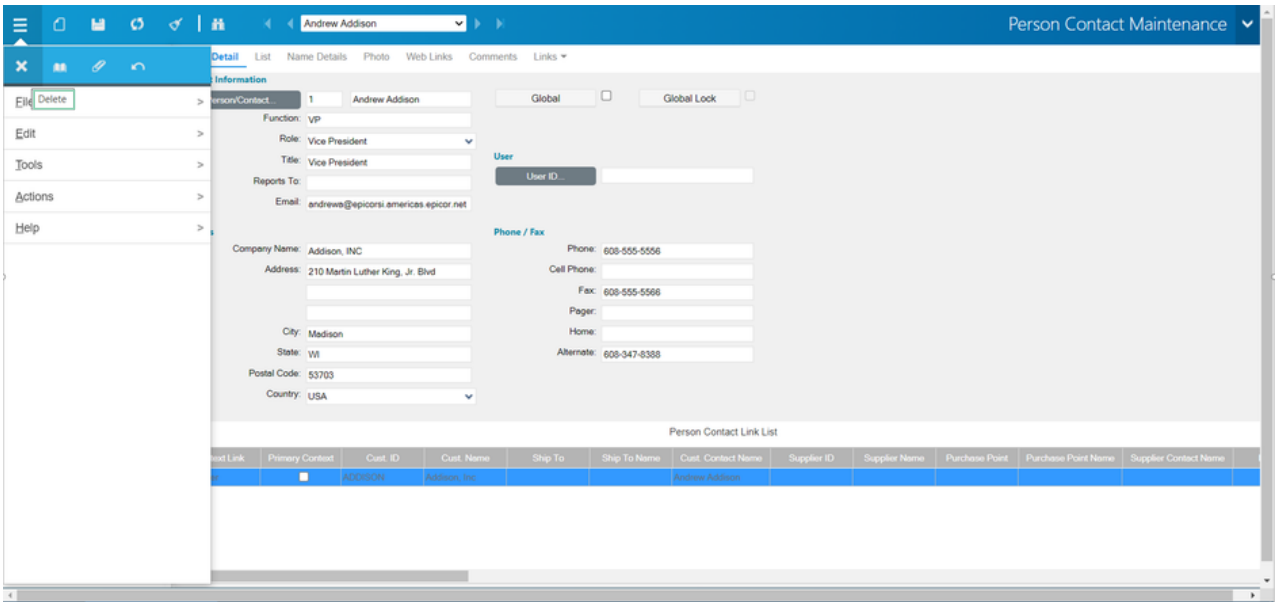
Pursuant to the EU and UK GDPR, EU individuals may request that all of their Personal Data be deleted in certain situations. This type of request is commonly referred to as “Request for Deletion”, “Request for Erasure” or “Right to be Forgotten Request”.

Notes: If it is not technically feasible to erase Personal Data, it may be possible to update the data so that it can no longer be linked to an individual. This may be achieved using techniques such as anonymization, masking (replacing Personal Data with another value such as XXXXXX), or otherwise altering the Personal Data such that it is unidentifiable and cannot be re-identified or linked to an individual in any system.

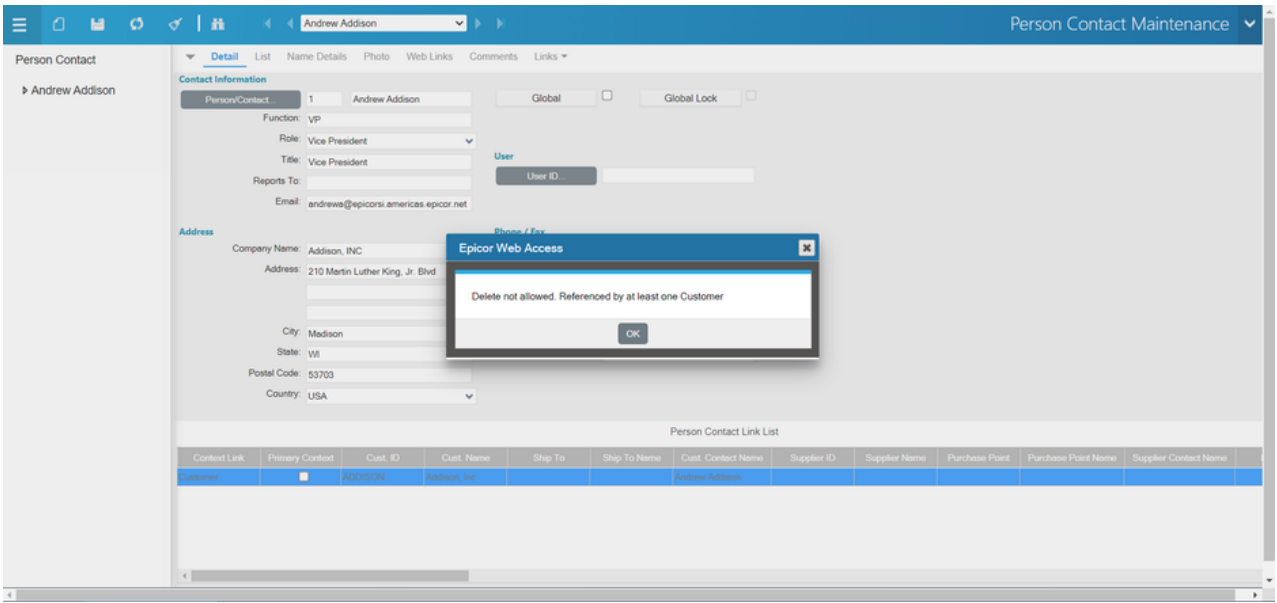
There may be valid reasons why Personal Data, notwithstanding a request, may not be deleted and it is important that any legal requirements and internal policy or processes are fully understood prior to the deletion of personal information. If the Personal Data may not be deleted, then the individual must be informed of such fact and reasoning.

Options available in Epicor Kinetic to support this type of request.

Companies can potentially process a “Request for Deletion” petition by using the Delete action in the entry screens



Epicor Kinetic allows deleting records only if the record has not been linked to other Personal entities like Buyers, Customer Contacts, etc. and if they have not been referenced in other entities or transactions like Sales Orders, Purchase Orders, Quotes. If the record has been linked or referenced to another entity or transaction the following message will appear.



If the record cannot be deleted the companies can process a “Request for Deletion” petition by manually anonymizing, masking (replacing Personal Data with another value such as XXXXXX), or otherwise altering the Personal Data such that it is unidentifiable and cannot be re-identified or linked to an individual in any system.

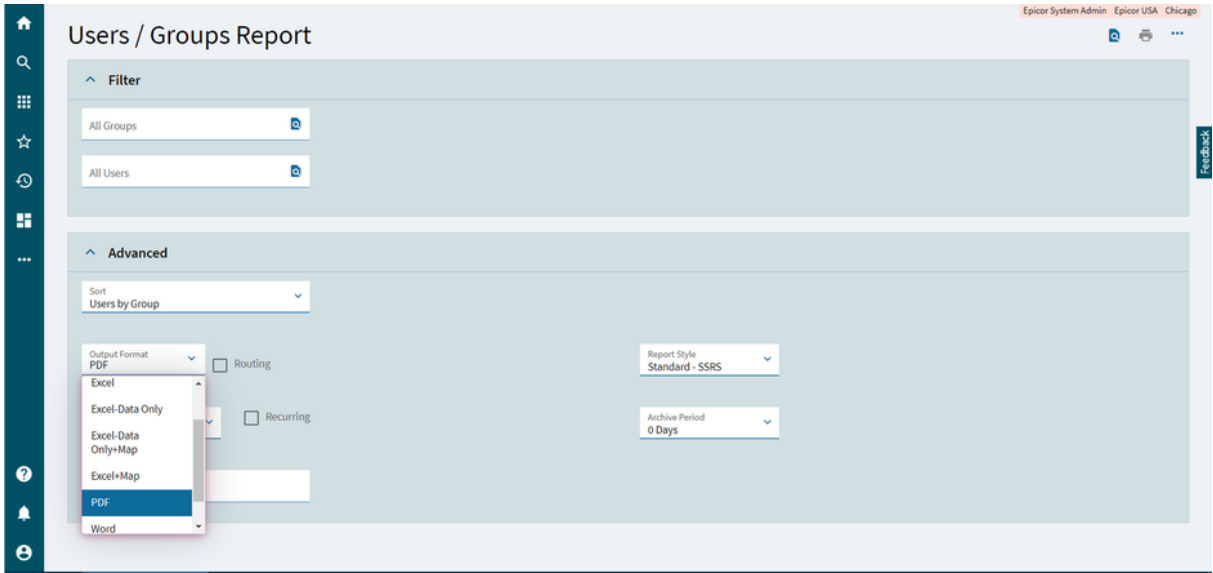
Request for transfer of Personal Data

Pursuant to the UK and EU GDPR, UK and EU individuals may request copies of their Personal Data in a structured format, and request that Personal Data be transferred to a third party of their choosing. This type of request is also referred to as “Request for Data Portability.”

Options available in Epicor Kinetic to support this type of request.

In order to process a “Data Portability” request, companies can create BAQ’s, Dashboards and reports using the Tools available in the Epicor framework (see table in page 9). Once the information is in these tools, it can be exported structured formats like XLS, SLSX XLS, XLSX, HTML, PDF, TXT or CSV.

Exporting Information from a Report



Exporting Information from a BAQ / Grid

Home

Search

Grids

Star

Refresh

Windows

More

Help

Notifications

Profile

Contact Tracker

Epicor System Admin | Epicor USA | Chicago

Contacts

All

Contact

Name	First Name	Last Name	Cust. ID	Customer Name	CustNum
Alfred Vincent	Alfred	Vincent	TWINGITIES	Twin Cities Motor Company	
Andrew Addison	Andrew	Addison	ADDISON	Addison, Inc	
Beverly Joseph	Beverly	Joseph	WEB000355	Guest Customer	
Bob Foreman	Bob	Foreman	VINEPRINT	Vineyard Printing Inc.	
Bob Formann	Bob	Formann	ECD	East Coast Distribution	
Christa Ultieg	Christa	Ultieg	CLARBL	Claronet Clinic - Bloomington	
Dave Greener	Dave	Greener	CHIGLEASE	Chicago Leasing Inc.	
ECC03 Admin	ECC03	Admin	B2CCASH	B2C Default Cash	
Frank DiCapris	Frank	DiCapris	ECD-R	East Coast Distribution - Raleigh	
Frank Fairbanks	Frank	Fairbanks	BOEING	Boeing Company	
George King Bundy	George	Bundy	IMC	International Machine Company	
Gerald Pennard	Gerald	Pennard	KENCO	Kenco Aeronautics	
Jane Butzer	Jane	Butzer	CLARPR	Claronet Prompt Care	
Jennifer Simpson	Jennifer	Simpson	BOEING	Boeing Company	
Jerry Johnson	Jerry	Johnson	NORTHERN	Northern Machine	
Jerry Lanier	Jerry	Lanier	DALTON	Dalton Manufacturing	
Jessica Jackson	Jessica	Jackson	ECD-A	East Coast Distribution - Albany	

Refresh

Save Layout

Export To Excel

Personalize Columns

Requests to restrict or stop processing

Pursuant to the UK and EU GDPR, UK and EU individuals may request a pause, or temporary stop, of the processing of their Personal Data in certain situations, for example, when the accuracy of the data is in question or when the individual believes the processing is unlawful.

Options available in Epicor Kinetic to support this type of request.

In order to process a “Restrict Processing” request, Epicor® ERP allows some methods to disable some personal information records or flag them as inactive using the standard entry screens.

Payroll Employee Maintenance

Payroll Employees

Employee > Detail

John J Labor

ID: 105

SSN: 477-99-6589

Person / Contact: 42 John J Labor

Name: John J Labor

Address: 123 First Avenue

City:

State/Prov: Chicago, IL

Postal Code: 63846

Country: USA

Phone:

Birthday: 01/04/1965

Email: johnlabor@cox.net

Payroll Class:

Hired: 10/06/2007

Terminated: ☐

Date:

Inactive: ☐

Emergency Contact: Marie Labor

Phone: 312-749-8378

Employee Photo




Image Name: M105

Supervisor: 105 David A. Cook

User ID: epicor

Epicor System Admin

Roles

Sync Name: ☒

Sync Address: ☒

Sync Phone: ☒

Sync Email: ☒

Entity	Method
Epicor Users	Disable Epicor User by clicking “Disable Account”
Person / Contact	Flag as inactive all the “Links”
Person / Contact Links	Not applicable
Employees	Change the Status to “Inactive”
Payroll Employees	Flag the record as “Inactive”
Customer Contacts	Flag the record as “Inactive” and or flag the record as “No Contact”
Supplier Contacts	Flag the record as “Inactive” and or flag the record as “No Contact”
Work Force	Flag the record as “Inactive”
Buyers	Flag the record as “Inactive”



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.

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