



## Before we begin—







You are on mute.

Submit your questions anytime.

We'll send you the replay.

## Introductions



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## Safe Harbor Statement

**FORWARD-LOOKING STATEMENTS.** Some of the information in the presentations constitute forward looking information, including with respect to future product strategies, financial condition, results of operations, continued profitability and activities of Epicor. While these forward-looking statements represent our current judgment, these statements are based on assumptions that are subject to a wide range of risks and our actual results could differ materially. Epicor undertakes no obligation to revise or update publicly any forward-looking statements.

## Agenda

- 1 What's new in 10.2.400
- 2 Tasks and timelines
- 3 What to expect during upgrade
- 4 Resources



## Introducing Epicor ERP 10.2.400 in the Cloud





The first of two major upgrades planned for 2019, as part of our regular cadence and commitment to helping your business grow through innovation.

Major releases like this bring you much greater usability, performance, and strategic value in a single upgrade.

That's why we're giving you 4 weeks to test and explore these updates before upgrading your production system.





## Epicor ERP 10.2.400



#### **Experiences**

**Epicor Virtual Agent Order Entry Automation** Mobile Expense Management Job Scheduling Board



#### **Industry**

Enhanced Project Mgmt Epicor Mobile Warehouse Supplier Portal MES Expansion Epicor IoT

#### **Analytics**

**Epicor Data Analytics Expansion** Epicor Data Discovery Expansion



#### Future (2019-2020)

UX Uplift (ongoing) Mobile Apps ISV Partner Ecosystem Connected Enterprise

Compliance Engine Enhanced BI/Analytics

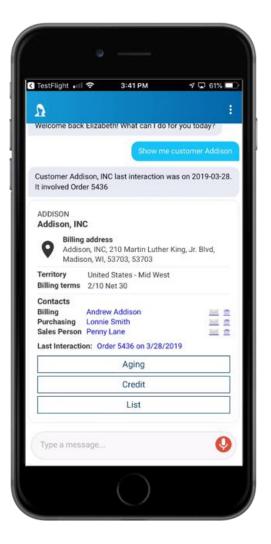
## Epicor Virtual Agent (EVA)



#### Intelligence personified for Epicor systems

- Conversational digital agent
- Azure-enabled, including Natural Language Processing (NLP)
- Available for iOS and Android in May

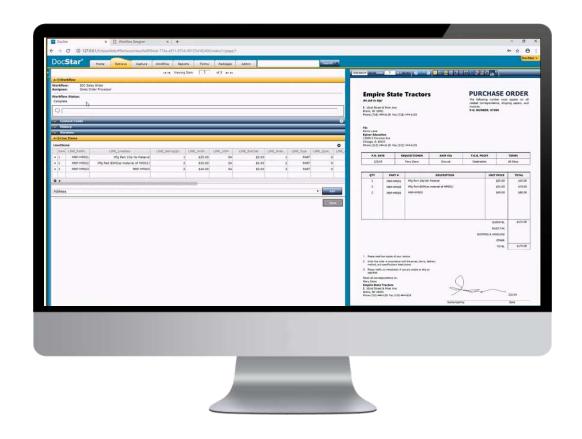






## Order Entry Automation

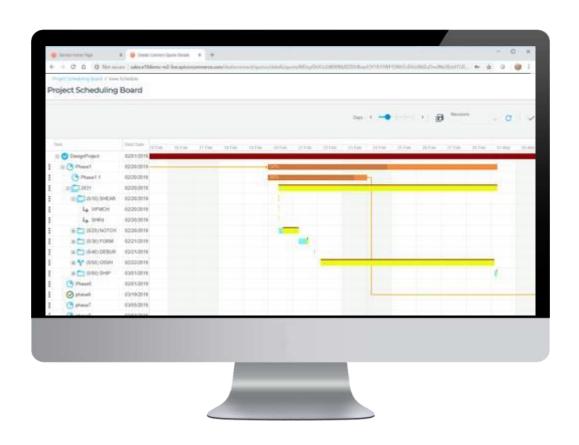
#### Capture sales orders and reduce manual order entry and errors



- Captures customer purchase order data from inbound emails, scanned documents
- Validates orders, then flows into Epicor ERP sales order entry
- Leverages DocStar and Intelligent Data Capture with Epicor ERP
- Great solution for repetitive actions and orders

## Refreshed Job Scheduling Board

Enhanced usability for a modern, Gantt-based view of scheduling board



- Faster, easier to use
- One of the most frequently viewed screens
- Leverages Kinetic System to provide modern customer experience

## Epicor Mobile Warehouse



#### Next-generation mobile handheld for warehouse and distribution



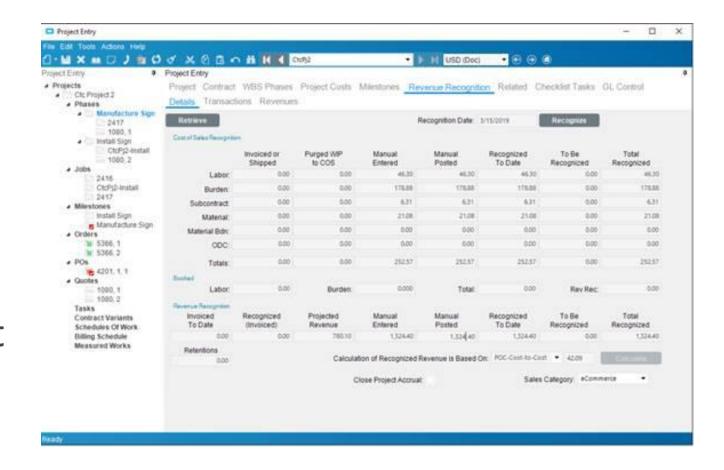
- Provides workflow optimization for fast and accurate scanning
- Part and bin level validation and complex sorting and filtering options
- Reduces time to process transactions, increases accuracy and reduces errors
- Available on Android, fully integrated to Epicor ERP



## Enhanced Project Management

Provide key stakeholders with timely financial information to ensure profitability

- Revenue recognition by WBS Phase
- Improved visibility into project stage completion percentage
- Delivers real-time project analysis through EDA.



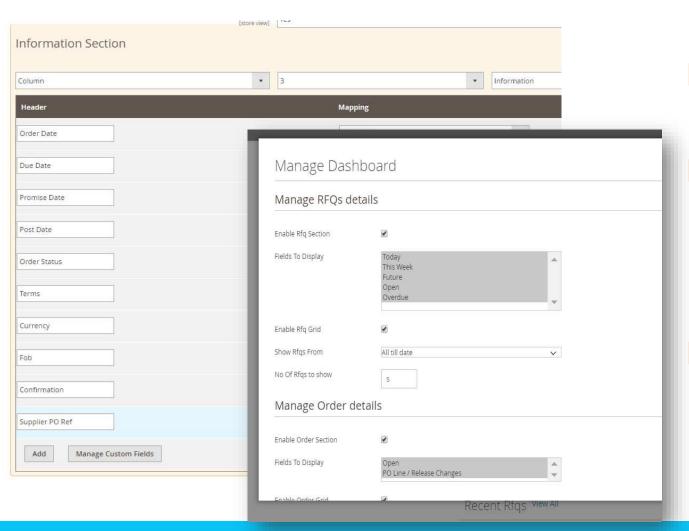
## **Epicor Advanced Projects**

- Extends Epicor ERP 10 standard Project Module
- ► Three new modules:
  - Advanced Project Management
  - Advanced Contract Order Management
  - Advanced Sub-contract Management
- Available late 2019 in collaboration with our partner Precise



## Supplier Portal

Manage supplier relationships, enter purchase transactions and process RFQs



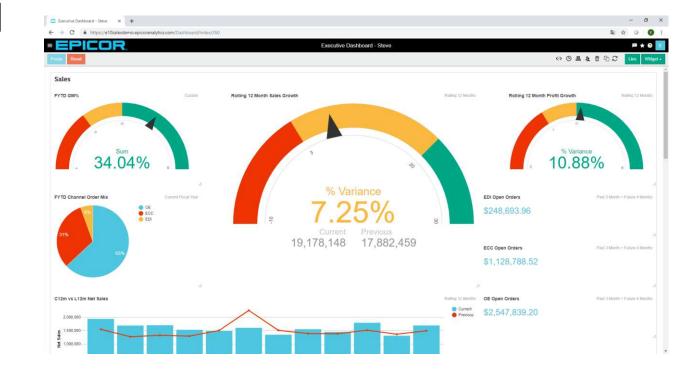
- Built on Epicor Commerce Connect
- REST-based communication between Supplier Portal And Epicor ERP for flexibility, security and performance
- ► E10 Credit Card module is no longer required to process fully paid credit card orders



## **Epicor Data Analytics Expansion**

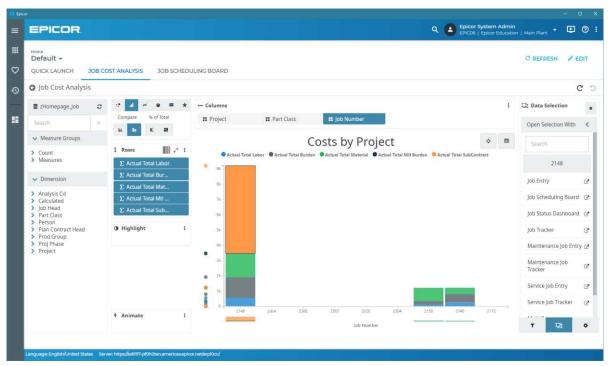
#### Analytics to provide insights on projects and production management

- New content packs for field service and preventive maintenance
- Updated content packs for production and project management, materials management, and Mattec MES



## **Epicor Data Discovery Expansion**

#### More options on viewing business critical data

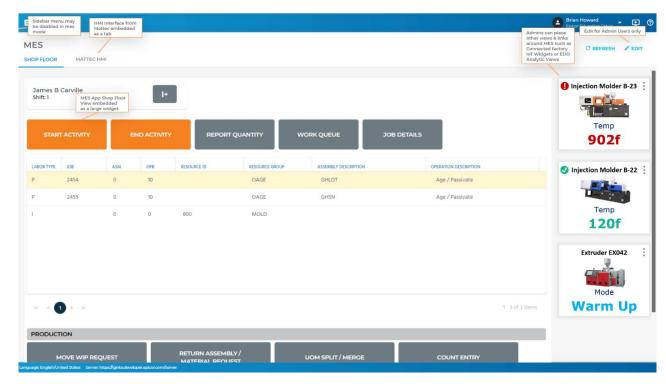


- New sidebar display that allows users to work and see EDD views at the same time
- "Open with" feature to open Epicor ERP forms and trackers in context
- ► EDD Discovery Dashboard widget as a tab on Active Home Page
  - EDD IoT widget to alert decision makers on what needs attention on the shop floor

## **ERP MES Expansion**

#### Modern refresh to improve usability of popular MES screens

- Provides users with functional and visual approach and transforms how shop users interact with the system
- Simplified workflow and modern look and feel with anywhere access
- Common interface with Mattec Advanced MES Human-Machine Interface (HMI)

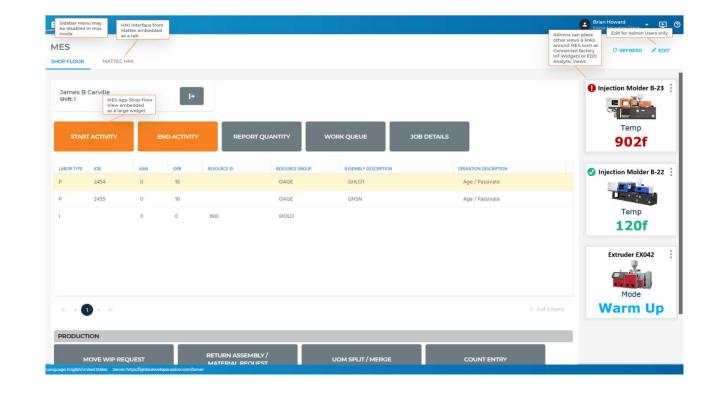




## **Epicor ERP and Mattec MES HMI**

Modern refresh to improve usability of popular MES screens

Common interface
 with Mattec Advanced
 MES Human-Machine
 Interface (HMI)



## **Epicor IoT**



#### Leverage IoT to acquire and analyze device data

IoT-enabled sensors send their readings to IoT Hub

Epicor ERP reads events from IoT Hub

Epicor creates a new maintenance order suggestion

Maintenance department approves suggestion and schedules maintenance

- Epicor IoT is integrated with the Microsoft Azure IoT Hub
- Monitor and visualize data from sensors including
  - Equipment
  - Assets
  - Environmental factors
  - Inventory locations

## New Reports

### Inventory

- New Stock movement report prints movements in and out per warehouse summarized for a given period
- New Stock Aging Report prints the current stock on hand by part, UOM, age of stock, and value of the aged stock.

#### ► GL

 New Booking Voucher report and the Booking Voucher FC report print journal transactions for a selected year and period range. The reports display a separate page for each document or voucher

## Enhanced Home Page Experience

- New Widgets Available
  - **Discovery Dashboards** A Data Discovery Dashboard is a collection of several views, that enables you to compare a variety of data simultaneously.
  - Discovery IoT Widget Use this widget to view the current status of the IoT (Internet of Things) Devices.
  - Web Applications Use this widget to host web applications, primarily kinetic-based applications, such as Manufacturing Execution System (MES) forms, scheduling boards, and others.
- Default Layout
  - You can pick a default layout that will be loaded for all users who do not have their own personal layout.
- New Kinetic Style bring the new look to all your ERP screens

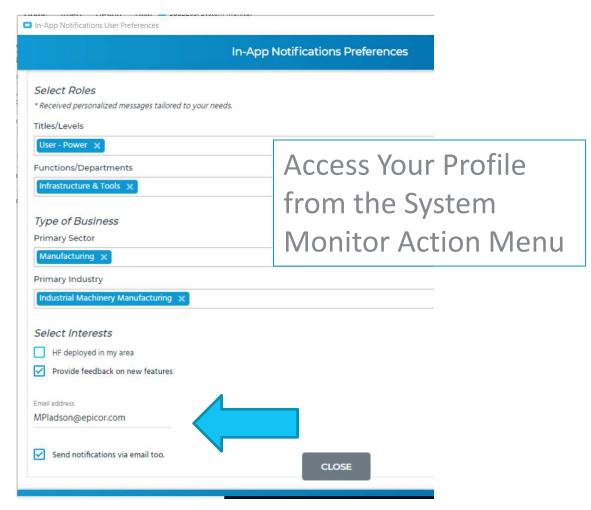
### Kinetic Features

- Quick Access Panel
  - Enables widgets on most of your master table and transaction screens
  - Enabled from the options menu per form
  - Can be used to keep key information handy
- ► In-app icon
  - In-app messages have an icon on the homepage notifying you of unread messages

## **Epicor Cloud Communication**

We strive for clear communication with you through in-app or email

- Email address on the In-app user profile now the official communication email address
- Cloud admin will sync both systems before go live
- Enables self service





## Tasks and timelines



## Timeline for 10.2.400

Friday

April

April

12

13

Monday
April
15

Required!
Your testing
window

Tuesday

May

7

Saturday

May

11

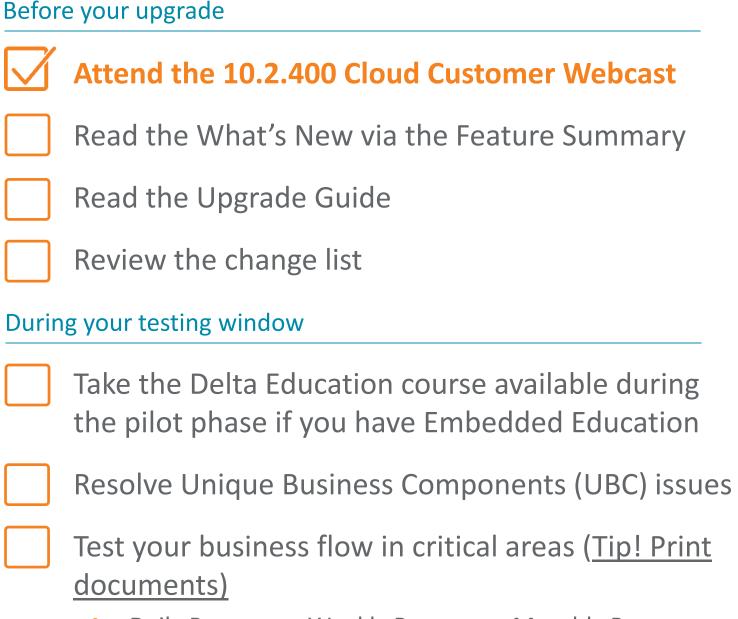
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#### **Pilot Upgrade**

- Use this time to test end-to-end
  - A sample test plan is available for download
  - Tweak the test plan and distribute to your power users
- The Epicor team will monitor for any failed Unique Business Components (UBC)
  - May 7 is your last day to fix any UBC
  - If you need changes later, that's ok. You'll just have to update your production system after golive.
  - Export all UBC changes to a known local location (Don't take the default location)

#### **Production Upgrade**

## Your Preparation Checklist



Daily Processes, Weekly Processes, Monthly Processes







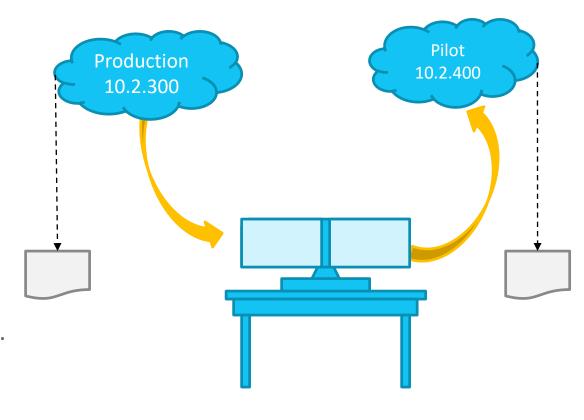
#### Feature Summary

What is it?	List of features organized by functional area so it's easy to find relevant info	List of changes by Functional Area with one line description	Step-by-step guide for your pilot and production upgrades
Why do I need it?	Helps you determine if new features can be utilized Day 1 or should be phased in over time	Allows you to review the bug fixes that are included	Contains details of using the Unique Business Component tracker for your upgrade and defines which companion products require a new download and setup
When do I use it?	As soon as possible	As soon as possible	As soon as possible
Where do I find it?	Built into the help system and available as PDF for download	EpicWeb-Cloud Documentation	EpicWeb-Cloud Documentation

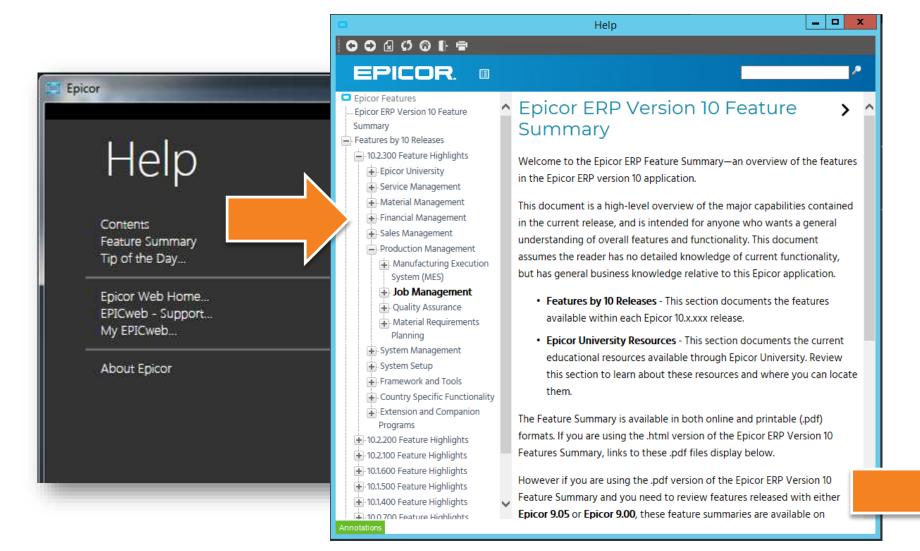
## Testing Your SSRS Reports in Pilot

## Ensure your critical reports will run day one #1 Critical Support Issue at Upgrade Can be Prevented

- Open both your production and pilot applications from the same PC
- Print the report in production
- Download your production report from production
- Upload the report into pilot
- Print the report in pilot
- Compare the two documents
- If there are unexpected results please create a EpicCare Ticket
- Cloud Operations will NOT automatically move reports from Pilot to Live with the UBC components. If you need something moved please create a ticket by May 7 with the exact report and RDD's you need to have moved.



## Where to Find the Feature Summary



Printable Version Available





## Pilot Weekend

- Pilot System off line Friday and Saturday
  - Login blocked during upgrade
- Cloud Ops
  - Copies production to pilot Thursday night at 10pm, migrations start shortly after
  - Upgrades pilot Friday and continuing Saturday
- Users enabled and able to login
  - Download happens automatically
  - No changes to Users \ menu \ permissions
  - System available for testing Sunday



## **Production Weekend**

- Production System off line Saturday Morning 12:01am local datacenter time
  - Login blocked during upgrade
  - Approximate time for upgrade 4-10 hours once your system has started
- During this time the Epicor team will...
  - Upgrade your production
  - Install solution from pilot if created
  - Send "all clear" messages
    - First to administrators, second to all users
- Users enabled and able to login
  - Download happens automatically
  - No changes to Users \ menu \ permissions
  - Local system admin import UBC previously saved to local drive and not included in solution
  - Pilot changes will be retained on a backup copy until May 19 if needed



# Please note: Customers who are in the Public Cloud and currently implementing

- The pilot database for all customers staying on Cadence and who are Live will be automatically refreshed Thursday, April 11<sup>th</sup> and upgraded on the 12<sup>th</sup>.
- ► All implementing customers will be upgraded on April 12<sup>th</sup> with the data in place in Pilot if you would like a refresh prior to ensure you are testing the latest data please raise a ticket in EpicCare.
- ► Implementing customers will NOT be able to have the database refreshed from Live to Pilot during the upgrade testing month so if you want this done it must be done prior to the 12<sup>th</sup>.

## Unique Business Component (UBC) Upgrade

## The Epicor team will:

- Upgrade your UBC items
- Work with you during the testing window, please submit submit an EpicCare support ticket

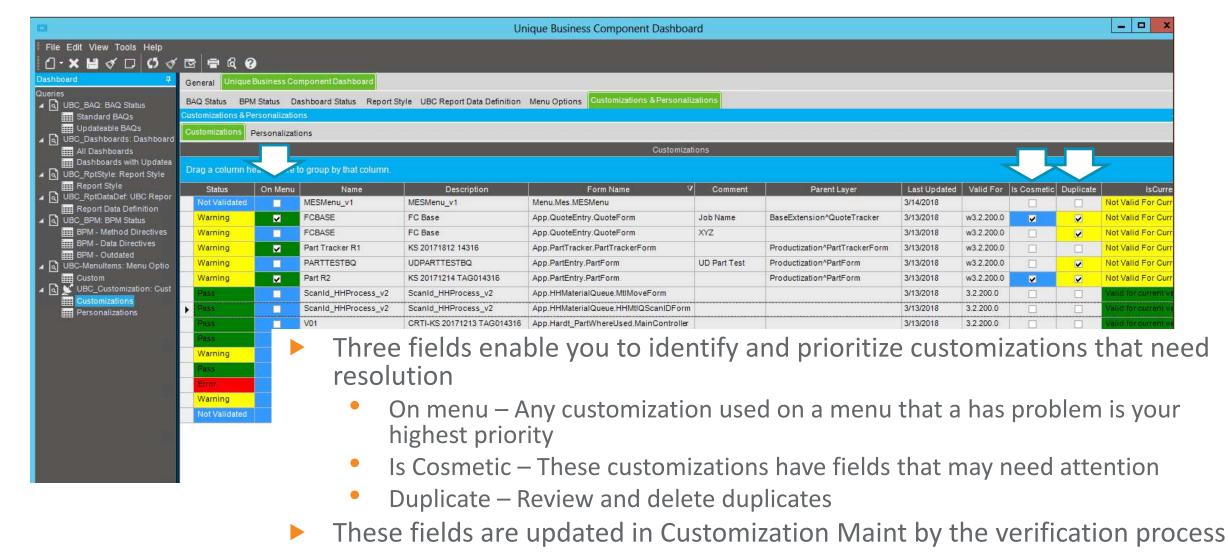
## We need you to:

- Use the UBC Tracker to prioritize what needs your attention : clean up old data and fix issues
- Use the sample test plans to walk through your business processes end-to-end (including *reports*)
- Work with the Epicor team to resolve items by May 7
- Create an EpicCare Ticket if you don't want Cloud operations to move your UBC from pilot to production

## Unique Business Components Tracker

- Provides a read-only overview of your UBC in one spot
  - Tabs organize your items so you can see what is good to go
  - Use it to identify obsolete or prototype items for cleanup
- Dynamically reads your data
- Customization panel refreshed every 4 hours

## **UBC** Customization Tab





## Have More Questions? Join us...

- First time implementing? Want to fine tune your process?
- Join us for an open mic session, hosted by Mark Pladson
  - Wednesday April 24
  - 11:30 am 12:30 pm CDT

Wednesday April

24

## **Embedded Education Courses**

The embedded education courses have been updated to include the following:

#### Project Management Course

 This course provides a foundation for using project cost control in Epicor ERP. Using this course you will oversee a specific project with multiple WBS phases and learn how to control and review project costs.

#### Dynamic Attributes

 This course explains how to enter Dynamic Attributes to retrieve data entered on the Dynamic Attribute Class level. If there are attributes that you want to capture from the configuration session, you can see how many times a particular attribute was used, based on your inputs selection

#### ► Introduction to Epicor REST Services v.1

 Added a new introductory course to using Representational State Transfer (REST) services for interaction with Epicor ERP.

#### Advanced Epicor REST Services v.1

Added a new course exploring REST-based scenarios of integration with Epicor ERP.



### Your Resources

10.2.400 Documentation

**10.2.400 Upgrade Guide** 

If you need help...



Login to **EpicWeb >** 



Login to <a>EpicWeb ></a>



Login to <a href="EpicCare">EpicCare</a>

Feature Summary

Available on EpicWeb and within your system's "Help" menu

Change List

All changes listed by Functional Area, available on EpicWeb Upgrade Guide

Step-by-step guide for a successful upgrade

EpicCare ticket

EpicCare is the best way to get live help and track your requests.

# Insights Epicor Customer Conference 2019

## The Epicor ERP in the Cloud Experience

#### Mon, Apr 15

Welcome to the



#### **Discover Industry Cloud in the**

#### **Experience Zone**

Located in the Solutions Pavilion

Your #1 source for everything cloud at Insights. Meet experts, network, see demos, and get inspired!

Special thanks to our diamond sponsor Microsoft



Orientations: Plan to make this your best conference ever

Rooms vary | 4:30 pm - 5:15 pm

#### **Welcome Reception**

#### Visit the Experience Zone – grand opening

Solutions Pavilion | 5:30 pm - 7:30 pm Cloud customers are cordially invited as our special quests to meet our cloud team and discuss cloud advancements.

#### Tues, Apr 16

Executive Morning Keynotes APEX PIPING SYSTEMS, INC.
A Specialty Products Company 8:00 am - 10:00 am

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**Epicor ERP Road Ahead** 

Mandalay Bay A-H | 10:50 am - 11:50 am

**Lunch** 12:00 pm - 12:40 pm

A Closer Look at 10.2.300 and 10.2.400 Mandalay Bay I | 12:50 pm - 1:40 pm

Cloud 101—Foundational Cloud ERP Best **Practices for Business Leaders** 

Lagoon A | 1:50 pm – 2:40 pm Microsoft



**Northern Transformer Drives Growth with Epicor ERP in the** Cloud

Lagoon A 2:50 pm -3:40 pm



**Epicor ERP Upgrade Panel** Breakers F

2:50 pm -3:40 pm





#### Reception

Visit the Experience Zone

Solutions Pavilion | 3:40 pm - 6:30 pm

#### Wed, Apr 17

**Customer and Guest Keynote Speakers** 8:00 am - 9:30 am

**ERP User Group Session** Rm TBD | 9:40 am - 10:30 am

Discover if E10 in Cloud is Right Fit for Your **Upgrade** (Repeated)

Lagoon B 10:40 am - 11:30 am **Integrating the Right** Data, Processes to **Power Connected Mfg** Breakers K TWG 10:40 am -

**₩Jitterbit** 

**How Tuffaloy Assessed Value and Rapidly** Deployed Epicor ERP in the Cloud **TUFFALOY** Lagoon A | 11:40a – 12:30p

11:30 am

**Lunch** 12:40 pm - 1:30 pm

Visit the Experience Zone 1:30 pm - 2:20 pm

How to Integrate a Hybrid Environment to **Unlock the Maximum Value** 

Lagoon B | 2:30 pm - 3:20 pm

Epicor ERP in the Cloud—Deployment Best **Practices for an Extended Enterprise** Lagoon B | 3:50 pm - 4:40 pm

> **Customer Appreciation Event** 7:00 pm - 10:00 pm

#### Thurs, Apr 18

**Advanced Configuration and Customization Options for Cloud-Deployed Epicor ERP** Lagoon J | 9:05 am - 9:55 am

Meet the Epicor ERP Cloud Team

Breakers D/E 10:20 am - 11:10 am



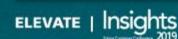
**Upgrade Cadence Tips** and Tricks for **Customers New to Epicor ERP in the Cloud** Lagoon C/D 11:25 am - 12:15 pm

**Product Configurator in** the Cloud Rm TBD 11:25 am - 12:15 pm



**Lunch** 12:15 pm – 1:15 pm

Discover If Epicor ERP in the Cloud is the Right Fit for Your Upgrade (Repeated) Lagoon C/D | 1:15 pm - 2:05 pm

















**EXPERIENCE ZONE**IN THE SOLUTIONS PAVILION

Premier destination to see real-world applications of the latest Epicor innovations that elevate your growth.











