

Get Ready for Epicor ERP Cloud 10.2.500

Preparing for Your
Release Upgrade

Epicor Customer Webcast

September 2019



[Click to Watch Replay >](#)

Before we begin—



You are on mute.



Submit your questions anytime.



We'll send you the replay.

Introductions



Kerrie Jordan
Director, Cloud Product
Management and
Product Marketing



Amy Melton
Director,
Product
Management



Matt Meyer
Director, IT
ERP Cloud
Operations

Safe Harbor Statement

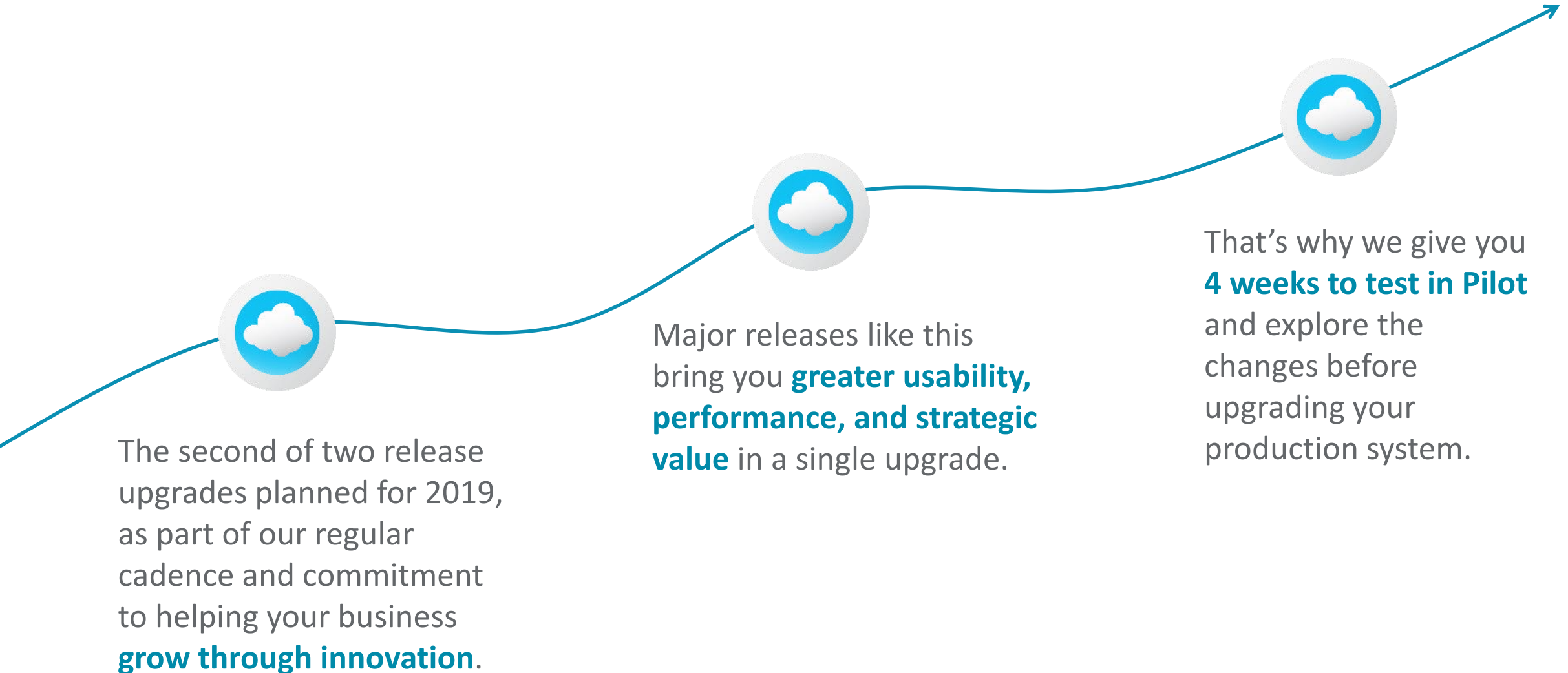
FORWARD-LOOKING STATEMENTS. Some of the information in the presentations constitute forward looking information, including with respect to future product strategies, financial condition, results of operations, continued profitability and activities of Epicor. While these forward-looking statements represent 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 10.2.500
- 2 Upgrade tasks and timelines
- 3 Resources




Introducing Epicor ERP Cloud 10.2.500




Epicor ERP Cloud 10.2.500 Highlights

Experiences



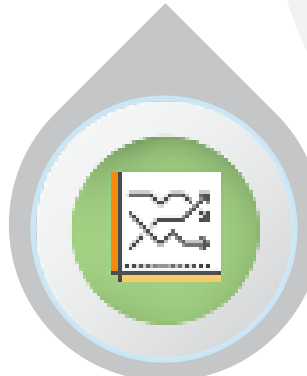
- Epicor Virtual Agent Skills
- Kinetic Epicor Collaborate
- Kinetic Mobile Warehouse
- Mobile Time & Expense Enh.
- Epicor Kinetic Preview

Industry




- Epicor Service Pro
- Mattec MES 8.3 Integration
- Finance Enhancements
- Country Specific Functionalities

Analytics



- Epicor Data Discovery Enh.
- Epicor Data Analytics personalization

Cloud



- System Notifications
- New Cloud Status Webpage
- Canada Datacenters
- Epicor Functions

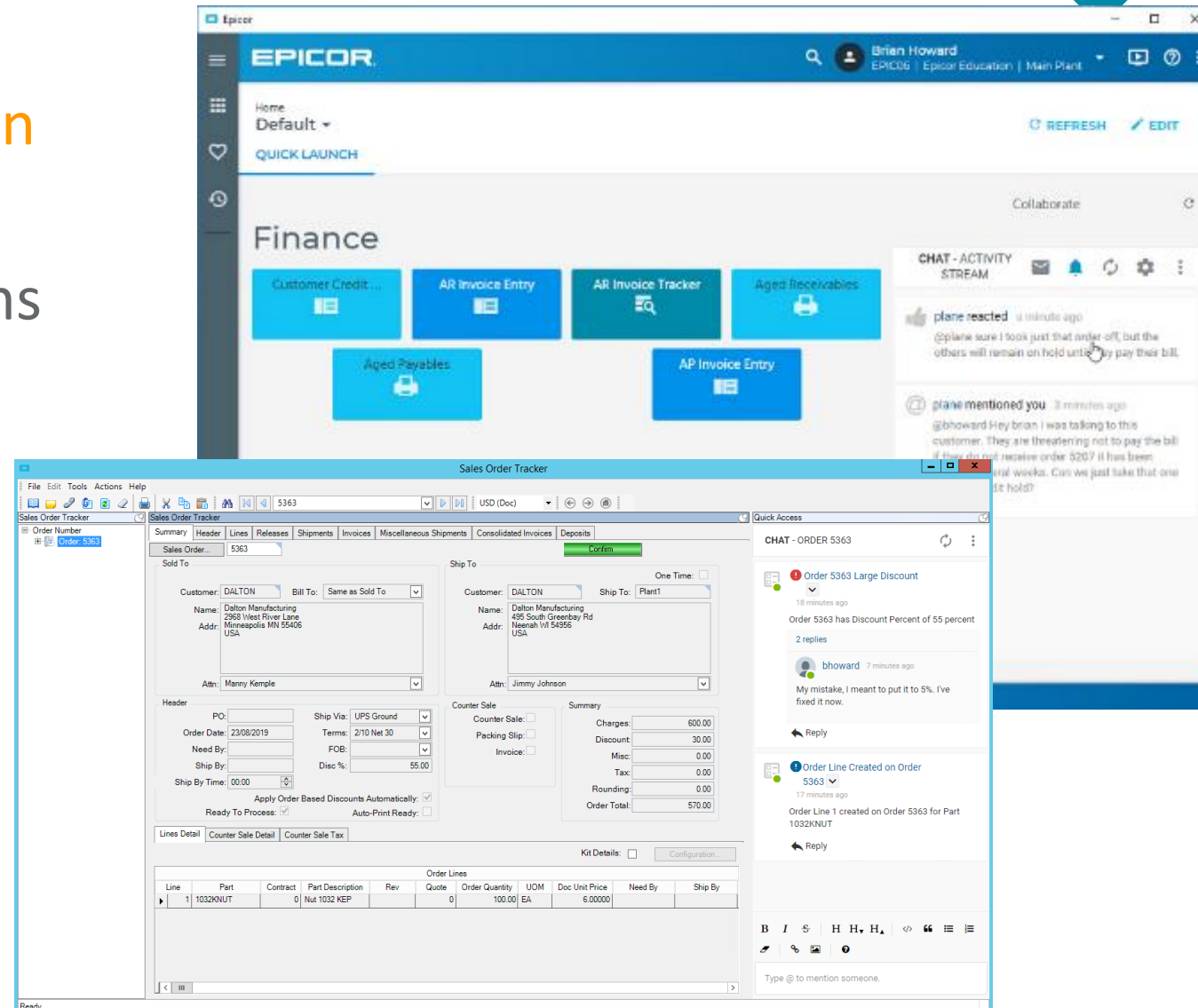
Epicor Collaborate

New solution
Purchase may be required



Cloud-based business collaboration

- ▶ Improve communication and collaboration among your teams
- ▶ Easy to use, intuitive interface
- ▶ Engage with colleagues using familiar social media concepts
- ▶ Follow relevant ERP entities
- ▶ View notifications and feeds in your homepage



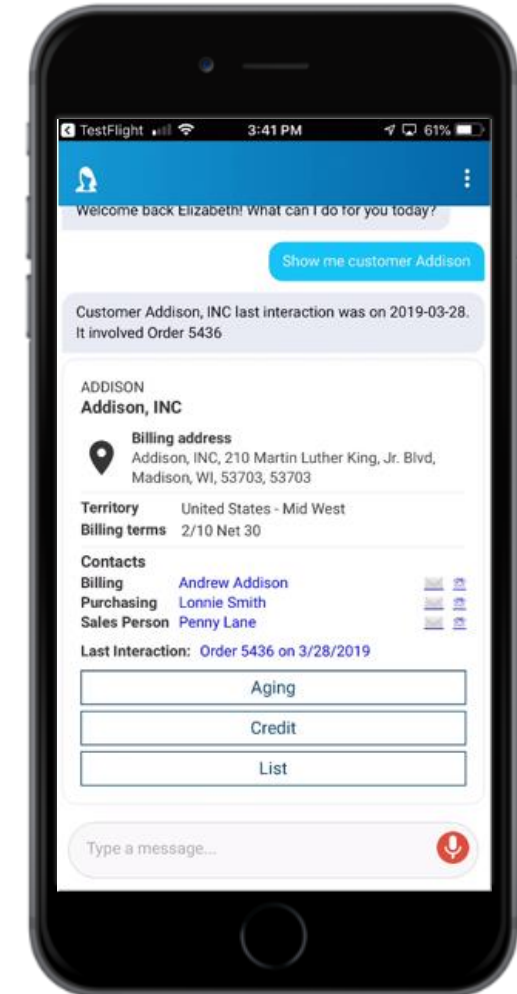
Epicor Virtual Agent (EVA)

Intelligence personified for Epicor systems



Free Trial Extended to December 31, 2019

- ▶ Conversational digital agent
- ▶ New skills have been added
- ▶ Azure-enabled Natural Language Processing (NLP)
- ▶ Available for iOS and Android

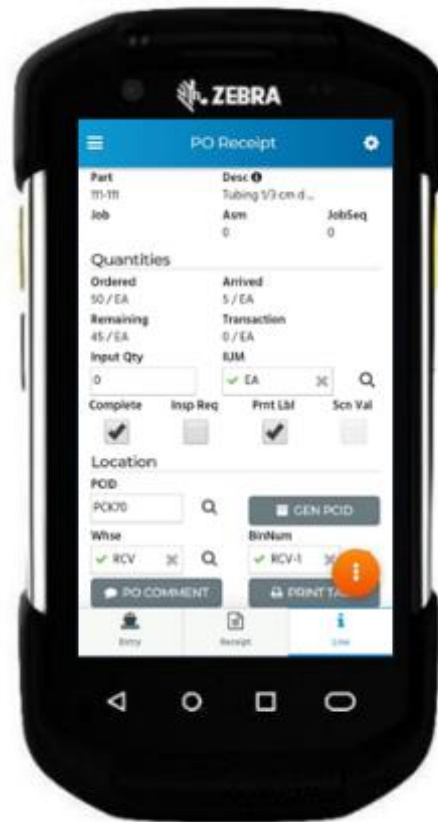


Epicor Mobile Warehouse

New solution
Purchase may be required



Uplift Epicor Mobile Warehouse to Kinetic design system



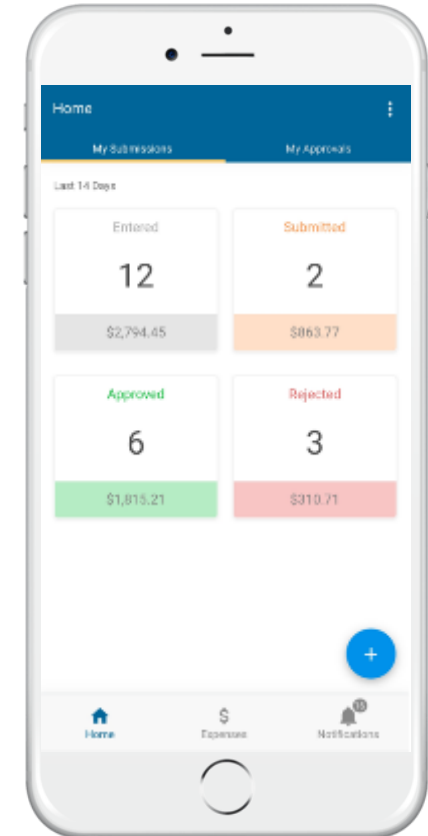
- ▶ Modern and intuitive app
- ▶ Provides workflow optimization for fast and accurate scanning
- ▶ Reduces time to process transactions, increases accuracy and reduces errors
- ▶ Part and bin level validation, and complex sort and filter option
- ▶ Integrated with Epicor ERP

Mobile Time and Expense



Increase your efficiency and throughput on-the-go

- ▶ Create timesheets or expense reports in offline mode
- ▶ Auto-sync offline changes when you go online
- ▶ New file type to manage attachments in cloud
- ▶ Add Time Reporting against Maintenance Jobs
- ▶ Compatible with both iOS and Android devices



Epicor Kinetic Design

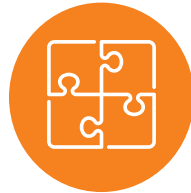
- ▶ Kinetic transforms how customers interact with our software, making them more productive by simplifying everyday tasks
- ▶ Kinetic is more than a modern look and feel and intuitive user interface, it also aims to automate the most critical business process functions



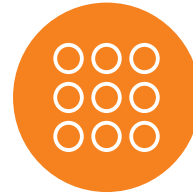
Simple



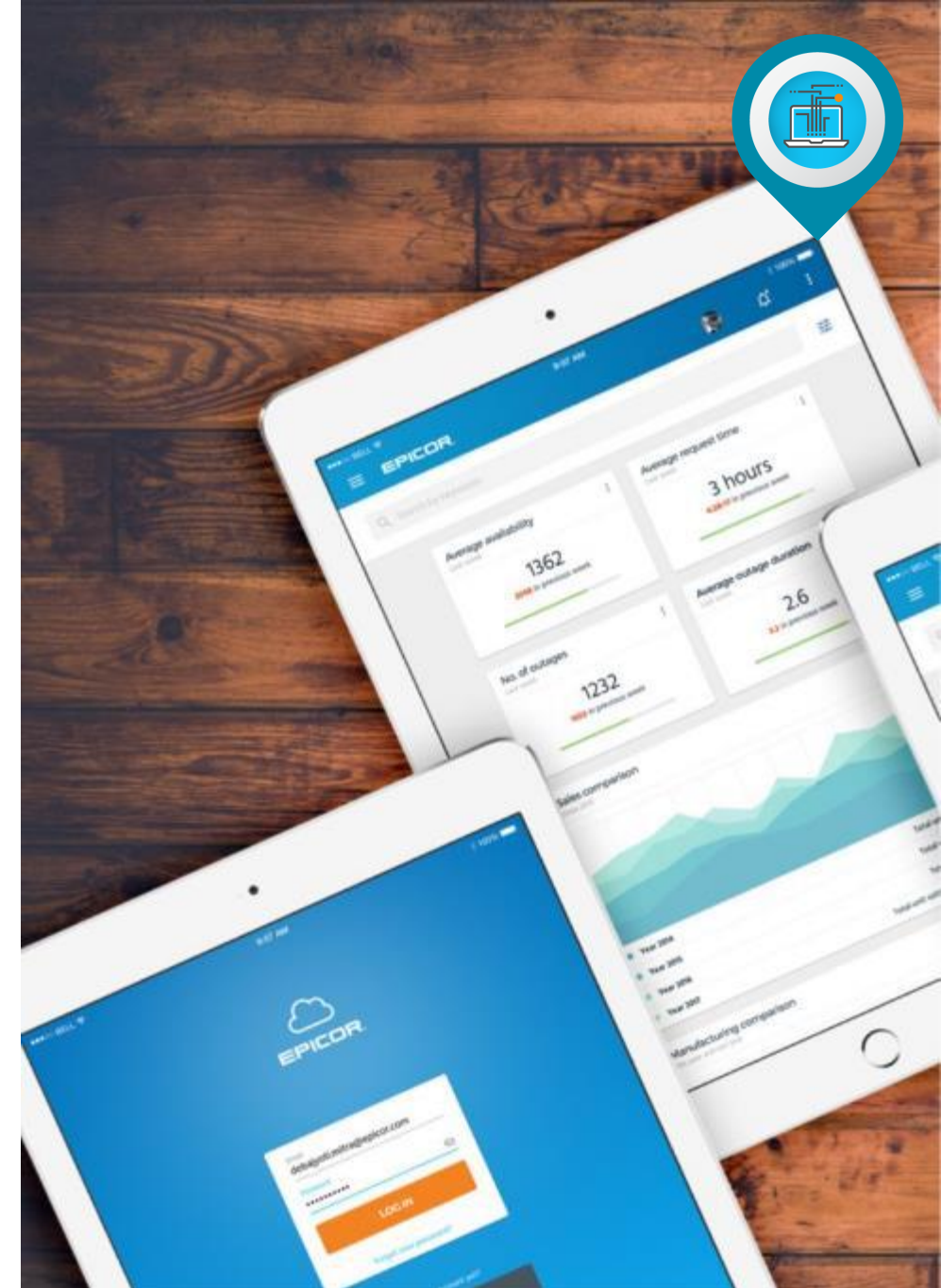
Intelligent



Modular



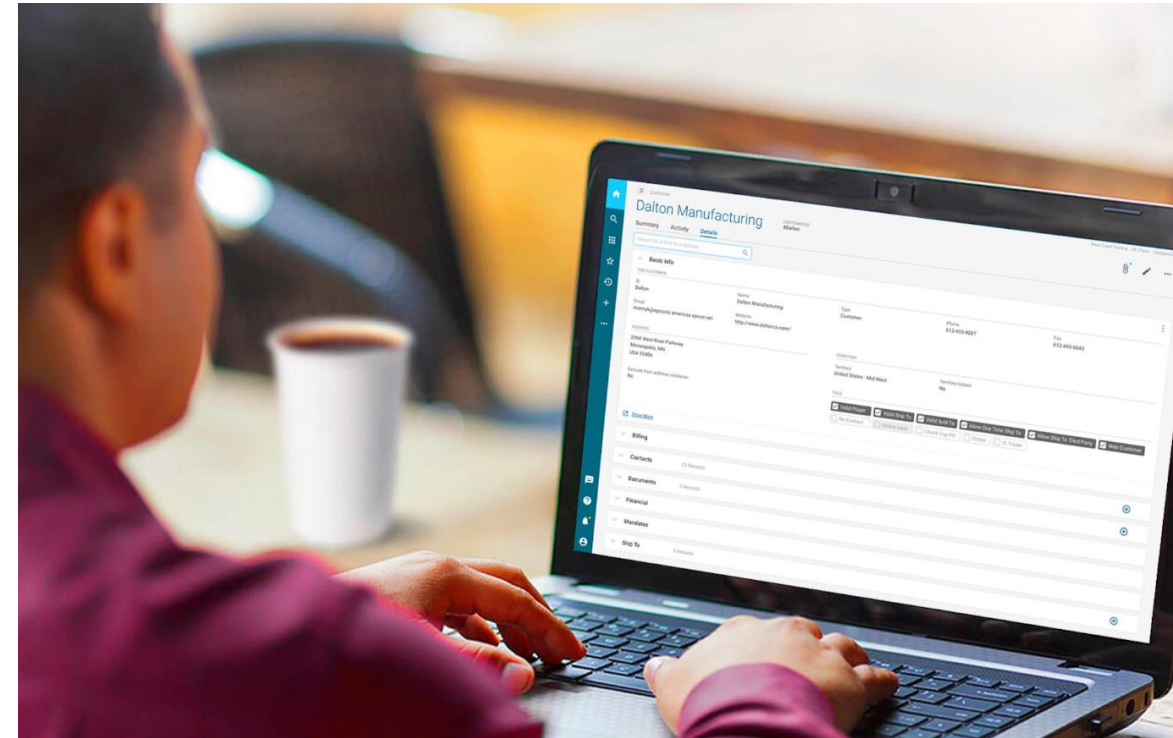
Consistent





Kinetic Preview Program

- ▶ Take advantage of this exclusive opportunity to gain early access to Kinetic
- ▶ Get familiar with its intuitive user interface and benefit from improved performance
- ▶ Test drive 600+ high demand reports and processes at no cost
- ▶ Provide feedback that will help shape the future releases of Kinetic
- ▶ Once the preview period is completed, benefit from a faster installation of the full product with the 10.2.600 release



Contact your Customer Account Manager or amelton@epicor.com to participate

Personalize your Analytics tools

Purchase may
be required



Gain More Insights That Matter



- ▶ Epicor Data Discovery has been “kineticized” for greater usability
- ▶ Epicor Data Analytics now supports custom views and dashboards grids



Epicor Service Pro

More efficiently schedule work, dispatch, and track technicians

- ▶ Integrate with inventory and financial systems
- ▶ Includes time-saving automation tools that streamline service calls, quoting, work order management, service contracts, and more
- ▶ Includes easy-to-use mobile service app for field technicians



Epicor ERP Cloud and Mattec MES 8.3



Improved Data Integration for Seamless Experience



- ▶ Integration redesign with RESTful API services for greater performance, SSRS reporting and support for Epicor IoT
- ▶ Improved efficiency in scheduling, allocation of jobs to machines and production reporting

Finance Enhancements



Increasing accuracy, speed, and security

- ▶ CRE Support for Level 3 Compliance to optimize credit card payment validation with deep transaction security information
- ▶ Resolve bank receipt file import performance
- ▶ Enhancements in Electronic Compliance Engine



Country Specific Functionality

New solution
Purchase may be required



Several critical updates to ten countries' functionality



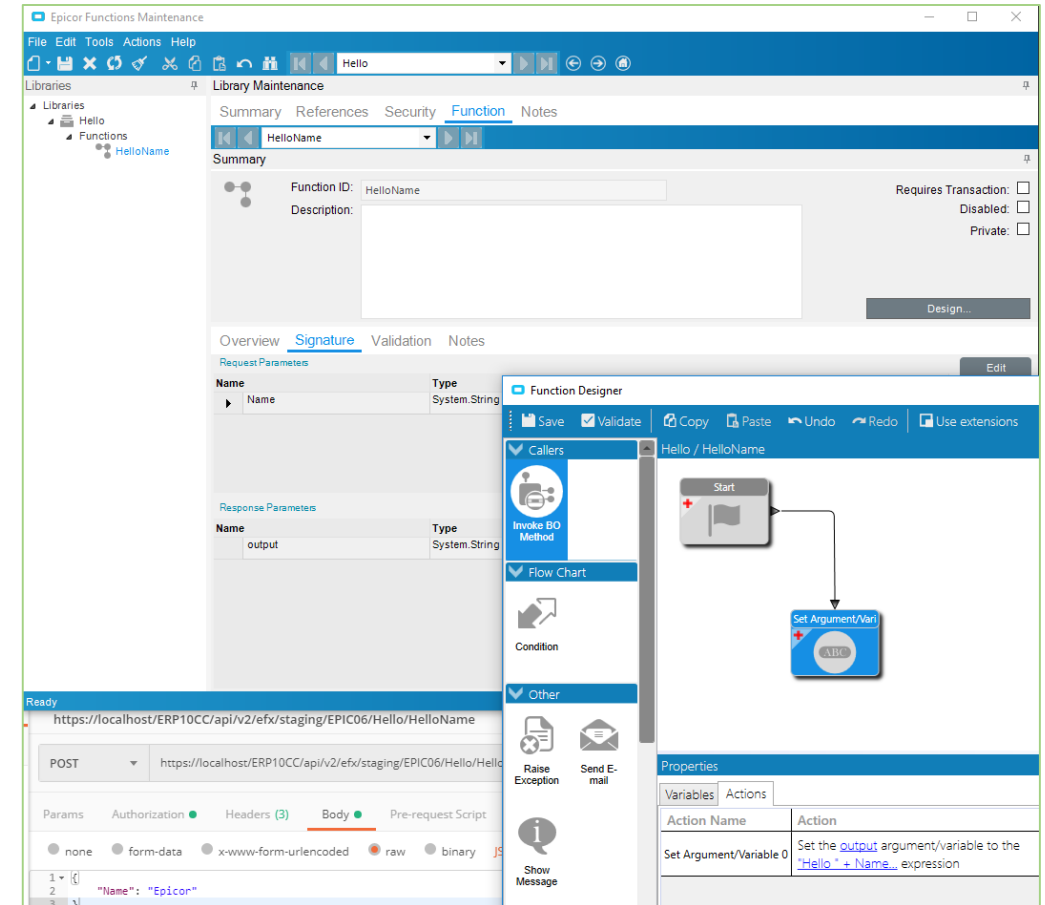
- ▶ Argentina
- ▶ China
- ▶ Colombia
- ▶ India
- ▶ Finland
- ▶ France
- ▶ Germany
- ▶ Malaysia
- ▶ Mexico
- ▶ Portugal

Epicor Functions

New solution
No purchase required, but C# code level
only available to Public Cloud customers

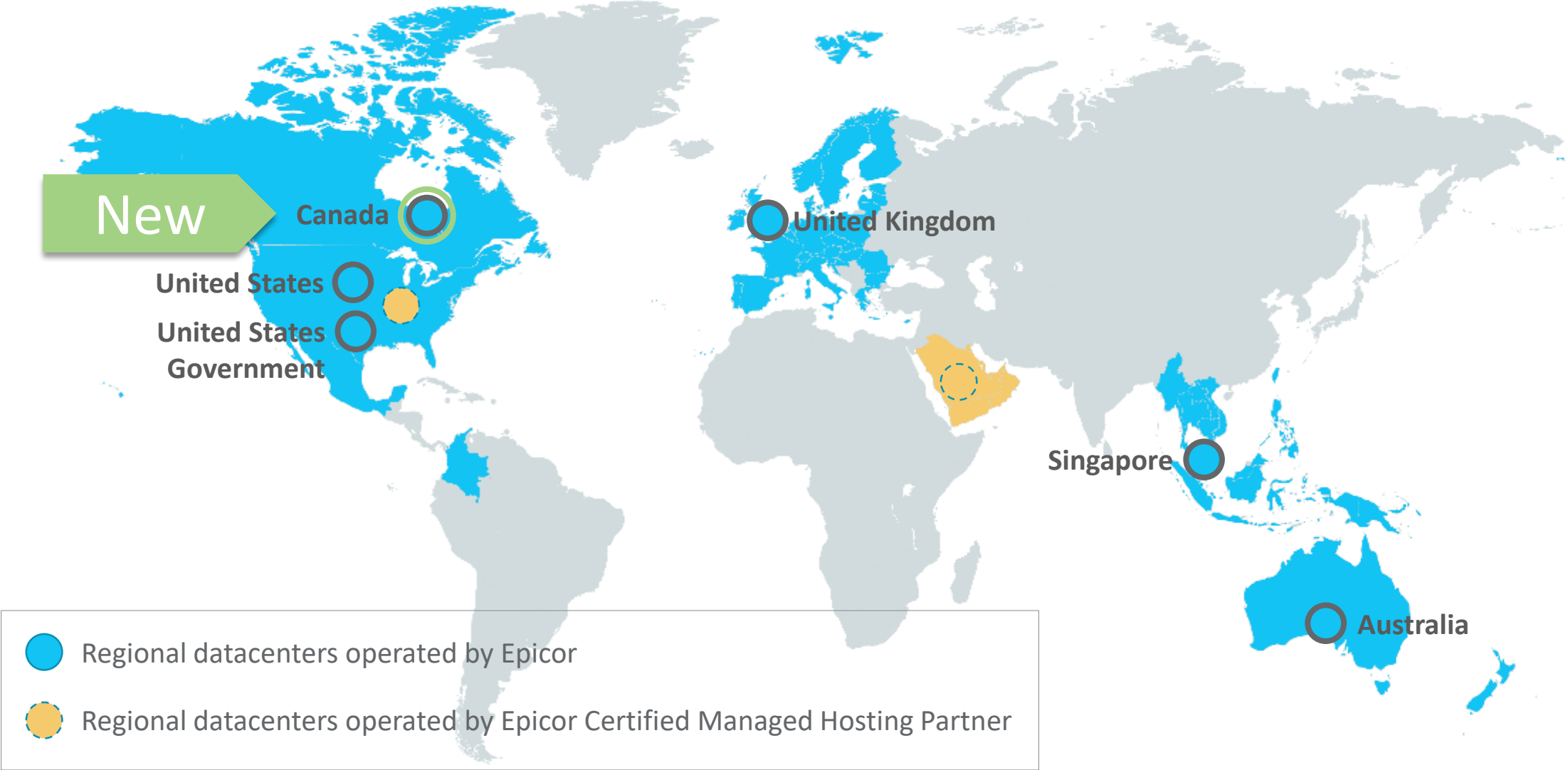


- ▶ Next Evolution of Epicor BPM's
 - Familiar BPM Designer Experience
 - New way of server-side customization
 - Eliminates copy and paste BPM logic
 - Integrations that upgrade
- ▶ Standards REST based approach
 - Because the logic is not built on the client and is called via REST, any device, OS, etc can call the function (ie. a calculation, integration, etc)





Epicor ERP Cloud Regions



Epicor Cloud Communication



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

- ▶ Email address on the In-app user profile is now where you enter your preferred communication email address
- ▶ Need to update your notification preferences?
 - Access your profile from the System Monitor -> Action Menu

In-App Notifications User Preferences

In-App Notifications Preferences

Select Roles
* Received personalized messages tailored to your needs.

Titles/Levels
User - Power x

Functions/Departments
Infrastructure & Tools x

Type of Business
Primary Sector
Manufacturing x

Primary Industry
Industrial Machinery Manufacturing x

Select Interests
☐ HF deployed in my area
☒ Provide feedback on new features

Email address
Your@email.com

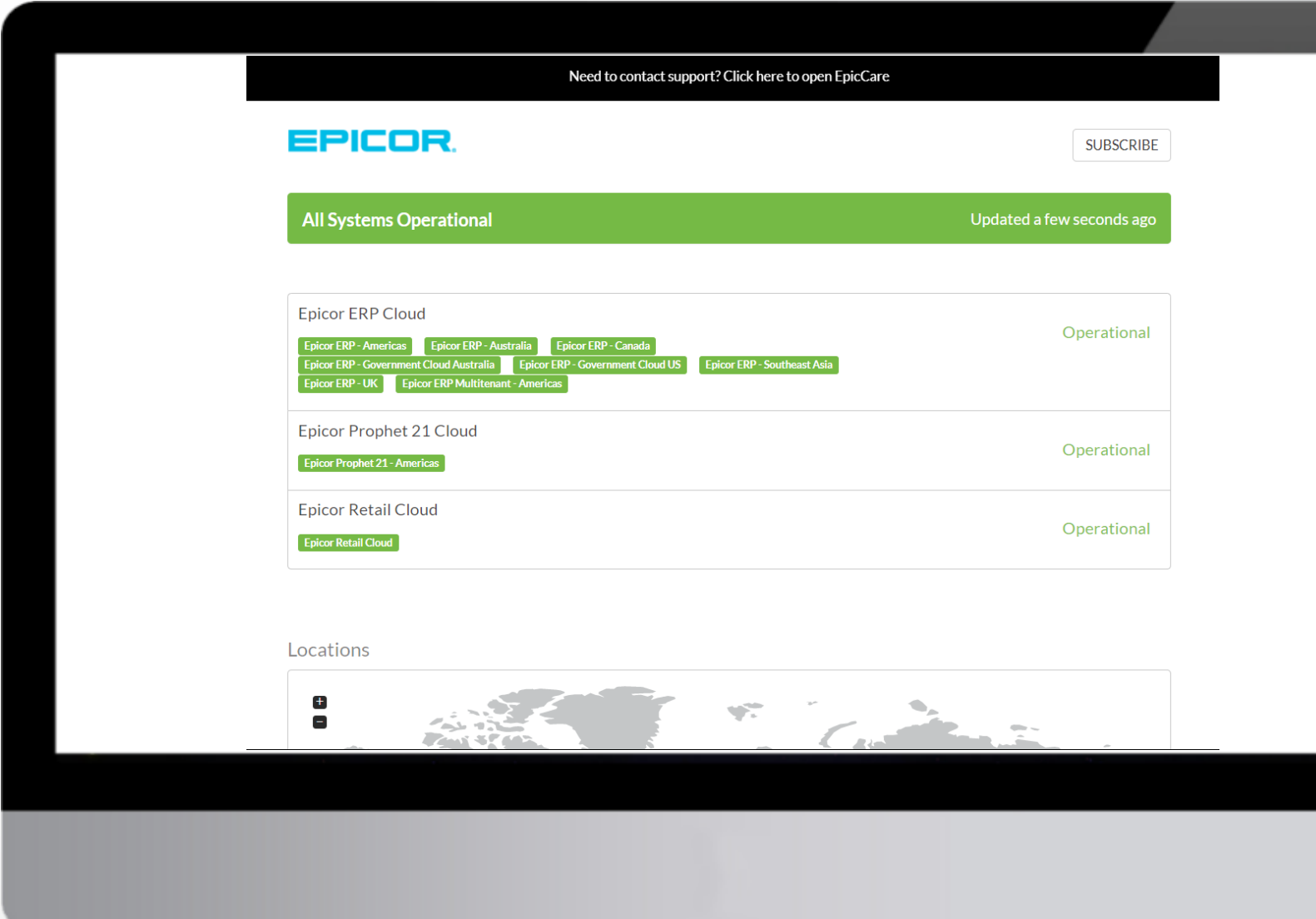
☒ Send notifications via email too.

CLOSE



Announcing a Cloud Status Webpage

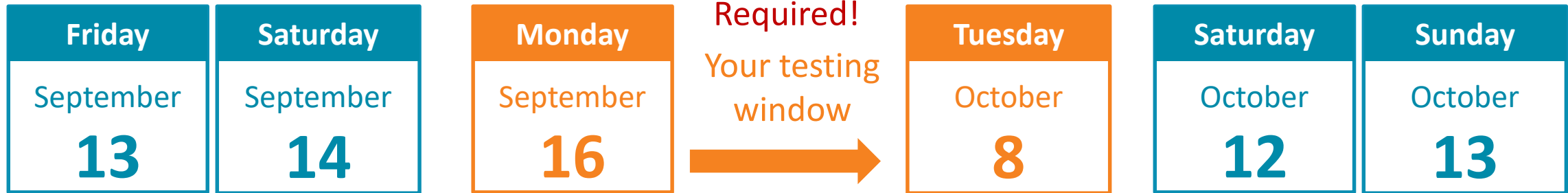
<https://status.epicor.com>



A woman with long brown hair, wearing a grey blazer over a white shirt, is looking down at a tablet computer she is holding. She has red nail polish and a ring on her finger. In the background, two other people are blurred, suggesting a meeting or office environment. A blue horizontal bar is overlaid across the middle of the image.

Upgrade Tasks and Timelines

Timeline for 10.2.500



Pilot Upgrade

- ▶ Use this time to test end-to-end
 - A sample test plan is available for download on EpicWeb
 - Tweak the test plan and distribute to your power users
- ▶ The Epicor team will monitor for any failed Unique Business Components (UBC)
 - October 8 is your last day to fix any UBCs and “opt-in” by requesting via EpicCare that the Epicor Cloud Ops team moves your UBCs to Production
 - If you need changes later, that’s ok. You’ll just have to update your Production after go-live.
 - Export all UBC changes to a known local location (*Don’t take the default location*)

Production Upgrade

New

Your Preparation Checklist

Before your upgrade

- ☒ **Attend the 10.2.500 Cloud Customer Webcast**
- ☐ Read What's New via the Feature Summary
- ☐ Read the Upgrade Guide
- ☐ Review the change list in the Release Notes document

During your testing window

- ☐ Resolve Unique Business Components (UBCs) issues
- ☐ Test your business flow in critical areas
(Tip! Print your customer-facing documents)
 - Daily Processes, Weekly Processes, Monthly Processes

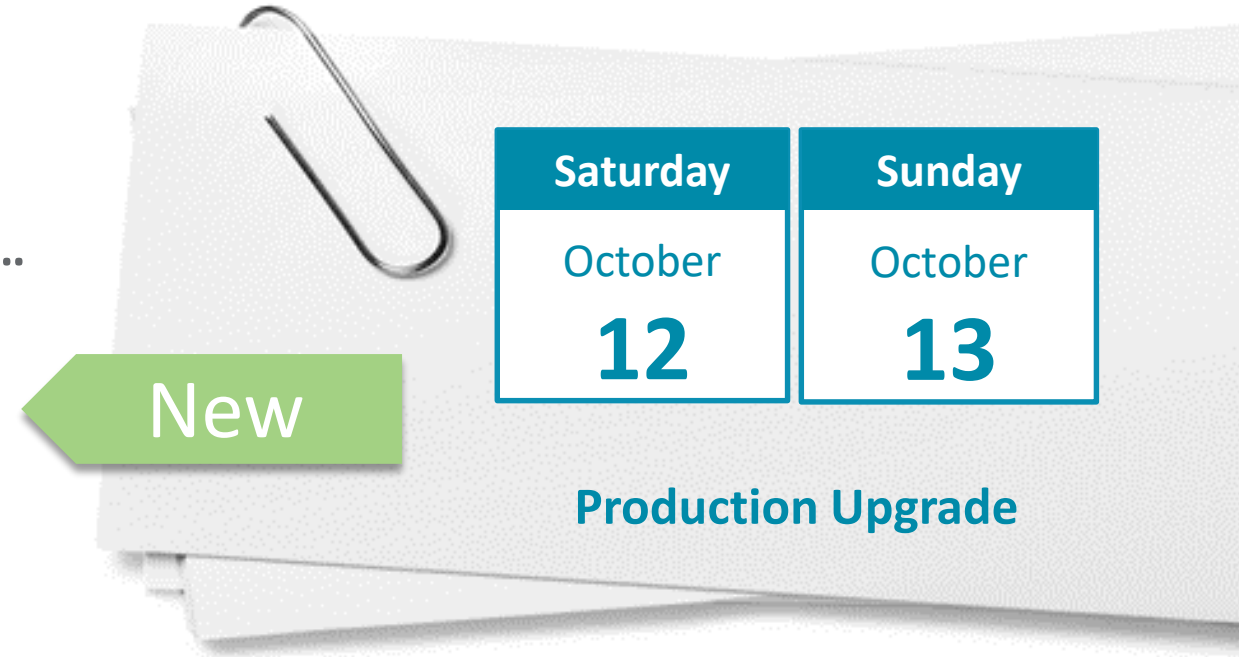
Pilot Weekend

- ▶ **Pilot System offline Friday and Saturday**
 - Not able to login during upgrade process
- ▶ **Timeline**
 - For *live* Public Cloud customers: We start copying your Production data to Pilot on Wed Sep 11 at 8:00 PM CT and through Thurs
 - For *MT, Express*: We start copying your Production data to Pilot on Thurs at 8:00 PM CT
- ▶ **When complete, your users are able to login**
 - Download happens automatically
 - No changes to Users \ menu \ permissions
 - 10.2.500 in Pilot system available for testing on Sunday



Production Weekend

- ▶ **Production System offline Saturday Morning 12:01 AM local datacenter time**
 - Not able to login during upgrade process
 - Approximate time for upgrade 4-10 hours once your upgrade has started
- ▶ **During this time the Epicor Cloud Ops team will...**
 - Upgrade your Production
 - Install UBCs solution from Pilot if requested
 - Send “all clear” messages
 - First to administrators, second to all users
- ▶ **When complete, users are able to login**
 - Download happens automatically
 - No changes to Users \ menu \ permissions
 - Local system admin import UBCs previously saved to local drive and not included in solution
 - Pilot changes will be retained on a backup copy until October 20 if needed



Data refreshes for customers who are currently implementing

- ▶ The Pilot database for all customers staying on cadence and who are live will be automatically refreshed starting Wed Sep 11 and upgraded Friday Sep 13.
- ▶ **All implementing customers will not be automatically refreshed.** You will be upgraded on September 13 with the data in place in Pilot.
 - But 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 Production to Pilot during the upgrade testing month – so if you want this done it must be done by Sept 11.

Customers with the option to Flex your Release Upgrade

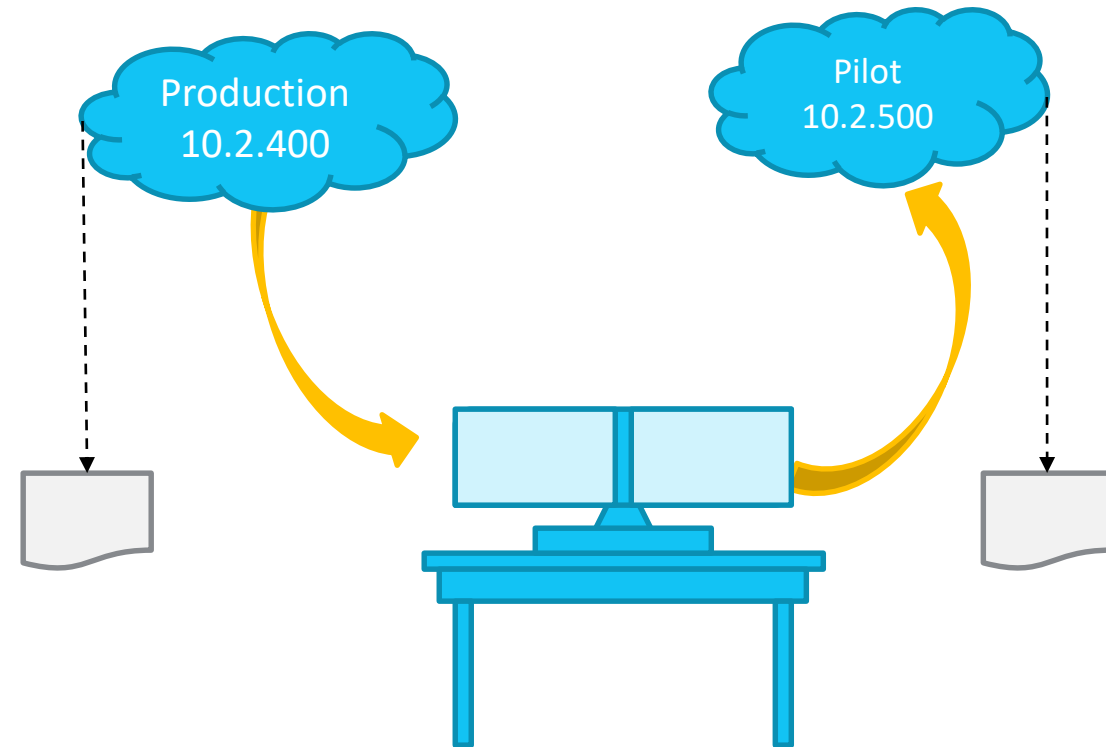
- ▶ Deadline was Monday, September 9 to submit your Flex request
- ▶ Updates:
 - Prior to 10.2.500, if you chose to defer your upgrade, you continued to receive 400.x updates up to your scheduled deferred upgrade date.
 - **New in 10.2.500, if you choose to defer your upgrade, you will NOT receive any scheduled 400.x updates after 10.2.400.11.**
 - Minimizes any disruptions to your business

New

Testing Your SSRS Reports in Pilot

Ensure your critical customer-facing reports will run

- ▶ Open both your Production and Pilot applications from the same computer
- ▶ 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 you need to make modifications, make them in Pilot, and take note so that you can move them post-upgrade
- ▶ If you need help, please submit an EpicCare ticket



Unique Business Components (UBCs)

The Epicor team will:

- Upgrade your UBC items to 10.2.500

You need 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 to resolve items by October 8
- Create an EpicCare Ticket if you DO WANT* Epicor Cloud Ops to move your UBC from Pilot to Production

New

*In 10.2.400 and earlier, Epicor moved your modified UBCs files automatically, **unless you opted-out** by requesting that they **not** be moved. In 10.2.500 and going forward, Epicor will only move your modified UBC files **if you choose to opt-in** by submitting an EpicCare ticket.

Unique Business Components Tracker

- ▶ Provides a read-only overview of your UBCs 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

Unique Business Component Dashboard

File Edit View Tools Help

Dashboard

Queries

- UBC_BAQ: BAQ Status
- Standard BAQs
- Updateable BAQs
- UBC_Dashboards: Dashboard
- All Dashboards
- Dashboards with Updateable
- UBC_RptStyle: Report Style
- Report Style
- UBC_RptDataDef: UBC Report
- Report Data Definition
- UBC_BPM: BPM Status
- BPM - Method Directives
- BPM - Data Directives
- BPM - Outdated
- UBC-MenuItems: Menu Options
- Custom
- UBC_Customization: Customization
- Customizations**
- Personalizations

General Unique Business Component Dashboard

BAQ Status BPM Status Dashboard Status Report Style UBC Report Data Definition Menu Options **Customizations & Personalizations**

Customizations & Personalizations

Customizations Personalizations

Customizations

Drag a column header to group by that column.

Status	On Menu	Name	Description	Form Name	Comment	Parent Layer	Last Updated	Valid For	Is Cosmetic	Duplicate	Is Current
Not Validated	<input type="checkbox"/>	MESMenu_v1	MESMenu_v1	Menu.Mes.MESMenu			3/14/2018		<input type="checkbox"/>	<input type="checkbox"/>	Not Valid For Current
Warning	<input checked="" type="checkbox"/>	FCBASE	FC Base	App.QuoteEntry.QuoteForm	Job Name	BaseExtension^QuoteTracker	3/13/2018	w3.2.200.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not Valid For Current
Warning	<input type="checkbox"/>	FCBASE	FC Base	App.QuoteEntry.QuoteForm	XYZ		3/13/2018	w3.2.200.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Valid For Current
Warning	<input checked="" type="checkbox"/>	Part Tracker R1	KS 20171812 14316	App.PartTracker.PartTrackerForm		Productionization^PartTrackerForm	3/13/2018	w3.2.200.0	<input type="checkbox"/>	<input type="checkbox"/>	Not Valid For Current
Warning	<input type="checkbox"/>	PARTTESTBO	UDPARTTESTBO	App.PartEntry.PartForm	UD Part Test	Productionization^PartForm	3/13/2018	w3.2.200.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Valid For Current
Warning	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Pass	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Pass	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Pass	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Warning	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Pass	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Error	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Warning	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	
Not Validated	<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>	

- ▶ Three fields help you identify and prioritize customizations needing resolution
 - **On menu** – Any customization used on a menu that has a problem is your highest priority
 - **Is Cosmetic** – These customizations have fields that may need attention
 - **Duplicate** – Review and delete
- ▶ These fields are updated in Customization Maint by the verification process
- ▶ We are posting a “how-to” video to the EpicWeb Cloud Documentation site



Resources



Feature Summary



Change List

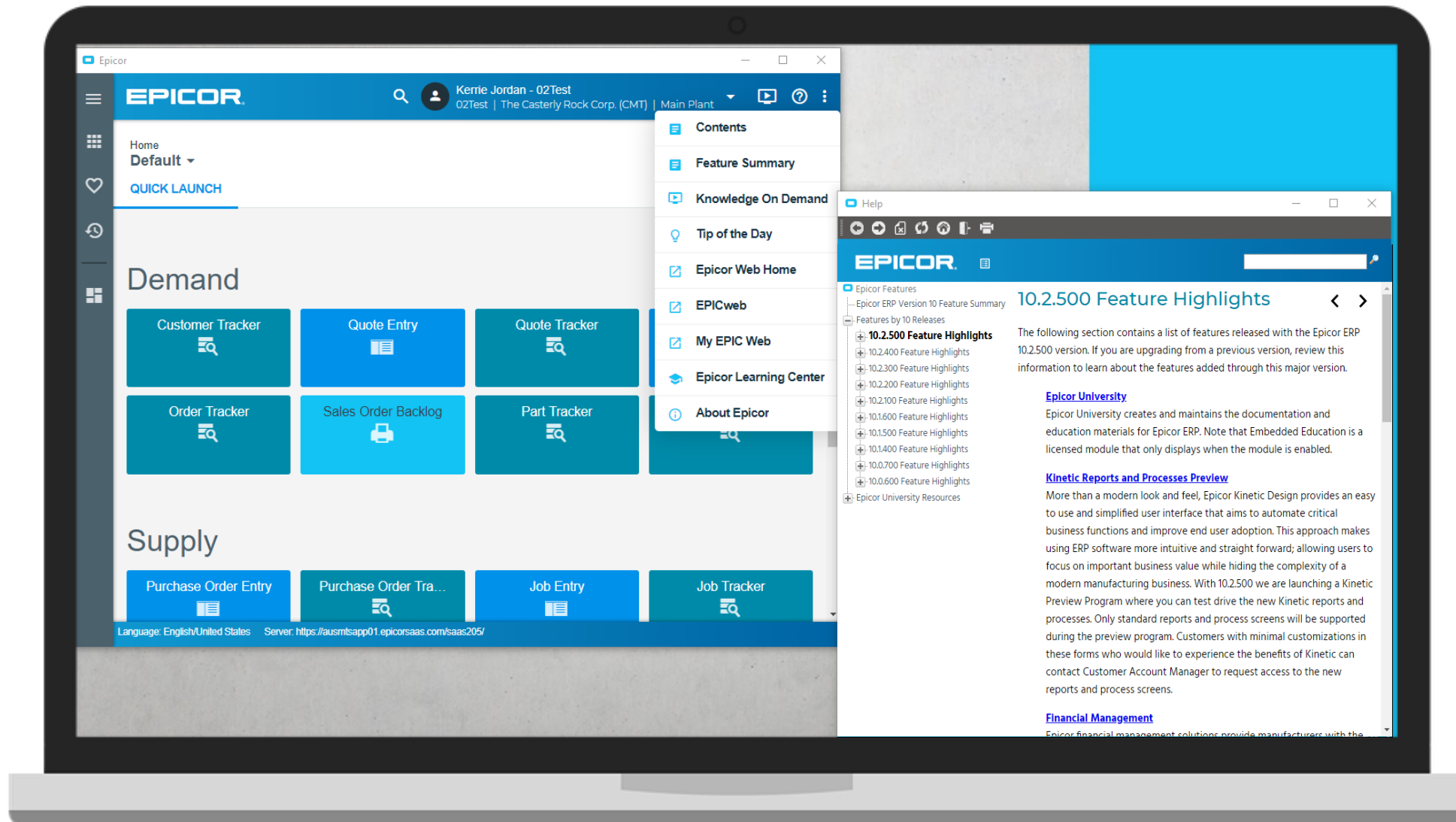


Upgrade Guide

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 it is posted	During your test in Pilot	During your test in Pilot and getting ready for Production
Where do I find it?	Built into the Help system and EpicWeb – Cloud Documentation	EpicWeb – Cloud Documentation	EpicWeb – Cloud Documentation



Where to find the Feature Summary



Embedded Education Courses

Structured and repeatable learning experiences

- ▶ **Epicor ERP Cloud 10.2.500 Embedded Education features 40 new courses and several updated**
- ▶ **Including cloud-specific training:**
 - Getting Started with Epicor ERP in the Cloud
 - Epicor Support and Cloud Operational Excellence
 - Leveraging the Unique Business Component Tracker to Manage Your Customizations During an Upgrade



Your Resources

10.2.500 Documentation



Login to [EpicWeb >](#)

► Feature Summary

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

► Change List

All changes listed by Functional Area, available on EpicWeb

10.2.500 Upgrade Guide



Login to [EpicWeb >](#)

► Upgrade Guide

Step-by-step guide for a successful upgrade

If you need help...



Login to [EpicCare >](#)

► EpicCare ticket

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

A hand with red-painted nails is raised high in the air, indicating a question or comment during a presentation. The background is a blurred office setting with people and a screen.

Q & A

Submit questions in the
WebEx Q&A panel.