

Get Ready for Epicor ERP Cloud 10.2.600

Preparing for Your
Release Upgrade

Epicor Customer Webcast

April 2020



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



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Director, Product
Management



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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 10.2.600
- 2 Upgrade tasks and timelines
- 3 Resources



Introducing Epicor ERP Cloud 10.2.600



The first of two release upgrades planned for 2020, as part of our regular cadence and commitment to helping your business **grow through innovation.**



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



That's why we give you **4 weeks to test in Pilot** and explore the changes before upgrading your production system.



Epicor ERP 10.2.600 Highlights

Experiences

- Epicor ERP Kinetic Dashboards and Trackers
- Epicor ERP Kinetic Application Studio
- Kinetic Help and Support Panel
- Epicor Collaborate Phase 2
- EVA Skills

Industry

- Epicor Financials Enhancements
- Epicor Quick Ship
- Epicor Cash Collect
- DocStar ECM 2020.1
- Epicor AMM PCID Transfers

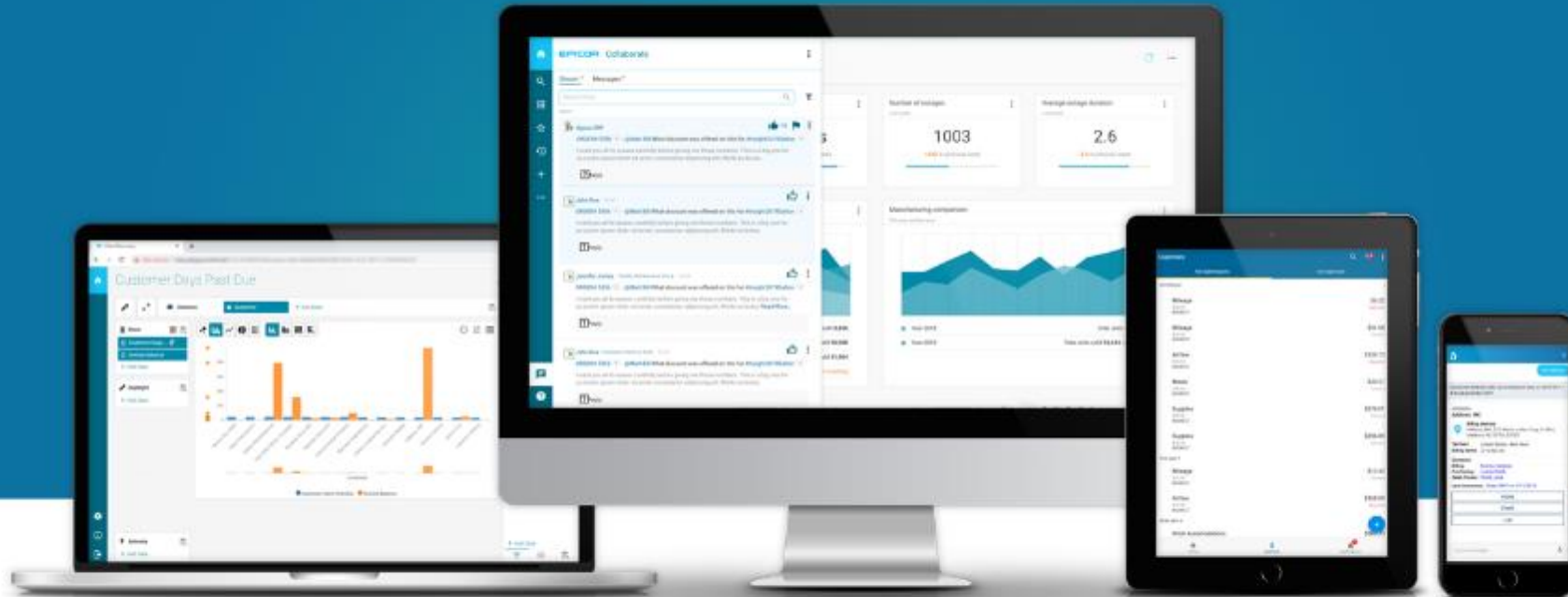
Cloud and Analytics

- EDA Financial Reporting
- Multi-Region Multi-Company Transactions
- Azure Germany Datacenter Functions and File Storage

Global

- Country Specific Functionality updates
- Epicor Electronic Reports

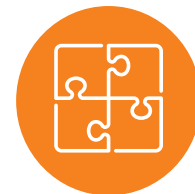
EPICOR KINETIC DESIGN



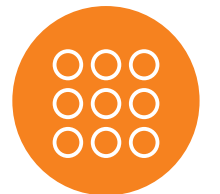
Simple



Intelligent



Modular



Consistent



Kinetic Highlights for 10.2.600

- ▶ **184** reports and processes
- ▶ **20** Trackers (Located on a new Trackers – Kinetic menu)
- ▶ Ability to deploy **dashboards** to Kinetic UI
- ▶ Ability to create **BAQ Reports** in Kinetic UI
- ▶ Ability to **personalize** and **customize** Kinetic forms
 - Epicor Application Studio (version 1)*
- ▶ Enhancements to Kinetic Home Page
- ▶ Kinetic App Maintenance*
- ▶ Kinetic version alert banner*

Refer to
Release Notes
for cumulative
list of Kinetic
forms

*coming in 10.2.600.2

EPICOR.

How can we help you

Search for a solution...

All Videos Articles Guided

Logging In to the Active Home Page
In this Knowledge on Demand, see how to log in to the Active Home Page.

Home Page Layouts
You can create default Home Page layouts on the Active Home interface.

Display Data Discovery Tile on Active Home Page
You can display your data view in a Data Discovery tile on the Active Home Page.

Accessing the Main Menu in the Active Home Page
In this Knowledge on Demand, see how to access and use the menu panel in the Active Home Page.

Tour of the Kinetic Home Page
This guided learning flow takes the user on a tour of the home page.

Home Page Layouts
You can create default Home Page layouts on the Active interface.

Explore Home Page
In the following topics, learn how to use individual elements and customize the Active Home Page to best fit your preferences.

Changing the Language in the Active Home Page
In this Knowledge on Demand, see how to change the language that displays in the Epicor ERP application using the options on the Active Home Page.

Home Page Template Security
There are two levels of security available for home page templates: BAQ Security and Template Security.

Display Field Level Help

Help and support center

Additional Help & Support

Epicor Learning Center
Access Epicor Learning Center (ELC) to access Epicor digital training. ELC is an online portal used to drive your Epicor training program.
[Access Epicor Learning Center](#)

Epic Care
EpicCare is your technical support portal for entering support tickets and making other requests.
[Access Epic Care](#)

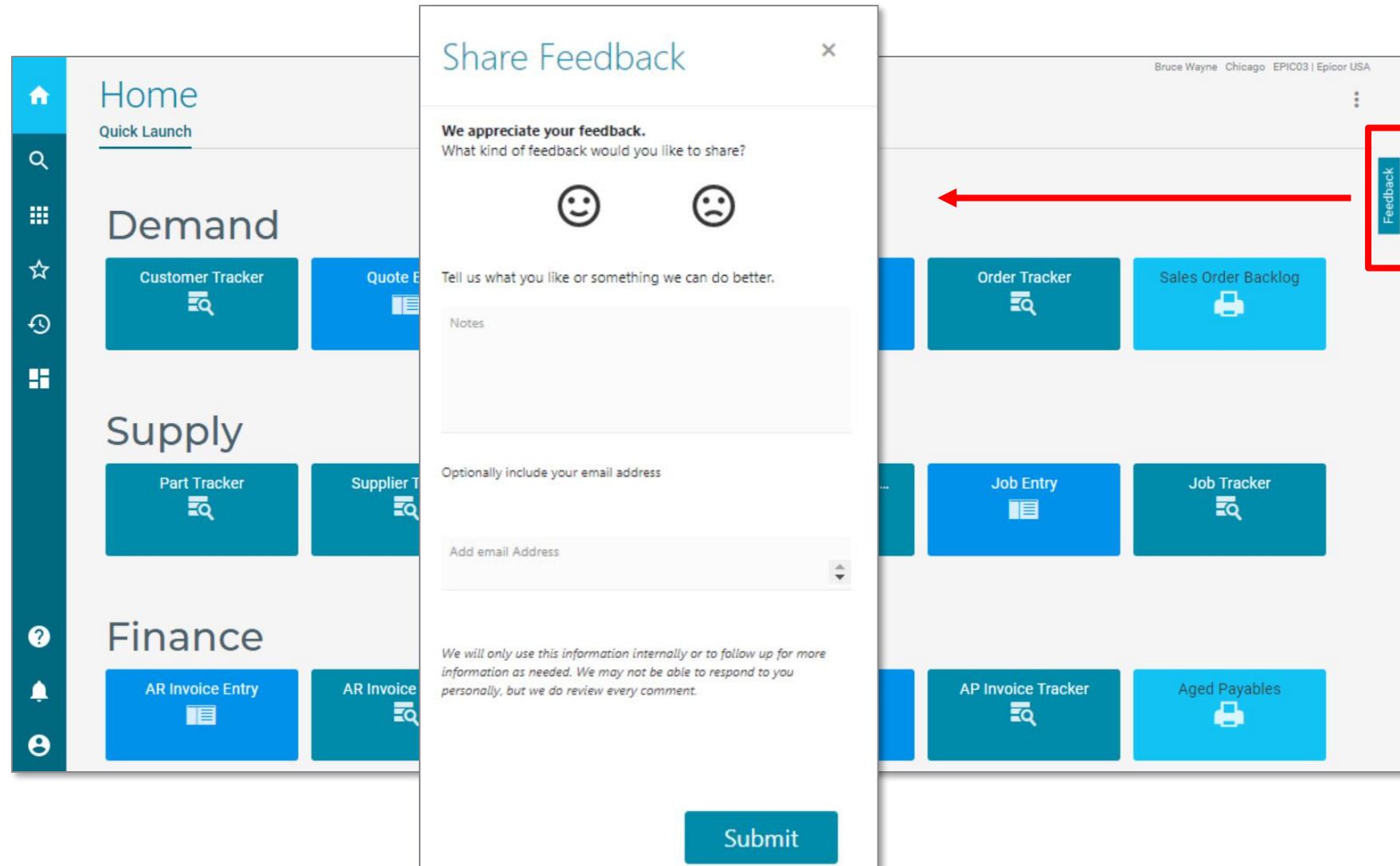
Epic Web
EpicWeb is your Epicor research portal where you can find downloads, professional services information and community offerings.
[Access Epic Web](#)

Help and Support Panel

- ▶ One click access to videos, articles and guided learning
- ▶ Context sensitive results
- ▶ Easy access to Epicor Learning Center, EpicCare, and EpicWeb
- ▶ Display field help

New In App Feedback

- ▶ Tell us your feedback
- ▶ Not a replacement for Support calls
- ▶ We will review!



Epicor Collaborate

Collaborate, share information and knowledge and gain visibility



- ▶ **Cloud-based**, collaboration solution within Epicor ERP
- ▶ **Simple, intuitive experience**
- ▶ **New in 10.2.600**
 - Editing, sharing, flagging, and tagging messages
 - Creating groups to make communication easier, including private groups
 - Creating custom notification rules
 - Designing BPM workflows to post notifications to Collaborate
 - Integrations with EVA, EDD, IoT and Microsoft Teams
 - Support for 11 additional languages

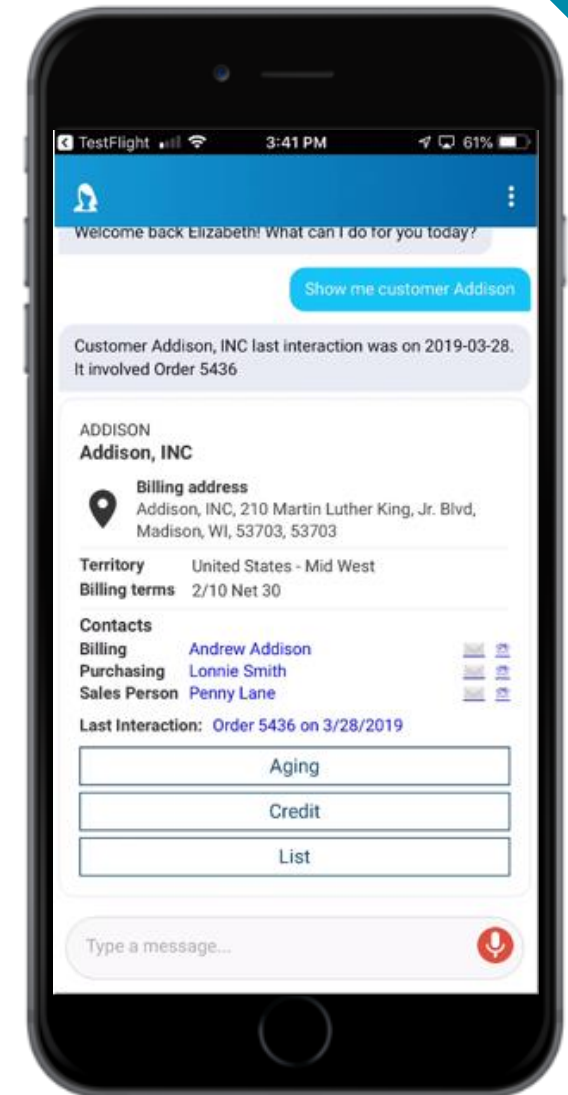


Epicor Virtual Agent (EVA)

Intelligence personified for Epicor systems



- ▶ Conversational digital agent
- ▶ EVA is enhanced with new skills each release:
 - Collaborate API – @EVA user posts message to a Collaborate group or individual
 - Return Material Authorization (RMA) Skill - "Create RMA for X pieces of [part] to [Customer]"
- ▶ Available for iOS and Android



Epicor ERP Core Financial Enhancements



Increasing accuracy, speed, and security

- ▶ Centralized AR collections
- ▶ AR/AP netting settlement
- ▶ AP invoice cancellation
- ▶ AR/AP invoices-WHT timing option through interim accounts



Epicor Cash Collect

Increasing customer service and visibility



- ▶ User friendly **Customer Portal** empowers businesses to better serve their customers
- ▶ New **Communications Assistant** enables collection representatives to record, transcribe and store calls
- ▶ **Document Creation** gives users a PDF print driver that enables printing a batch of invoices
- ▶ **Advanced Workflow** allows the ability to create custom workflows within Epicor Cash Collect



Epicor Data Analytics Financial Reporting

Get more insights that matter



- ▶ Replaces Advanced Financial Reporting with a modern, cloud-based BI and analytics solution
- ▶ All-in-one easy-to-use solution
- ▶ Robust financial reports such as financial statements, balance sheets, cash flow reports in a pre-packaged format
- ▶ Offers Financial Planning and Analysis (FP&A)
- ▶ Device-agnostic





Epicor Advanced Project Management

Gain deeper cloud-based project management capabilities

- ▶ Provides an integrated project management for customers with modules for:
 - Project Contracts
 - Project Accounting
 - Project Subcontracts
- ▶ Simplifies and streamlines the contract management process and tracks at the subledger level

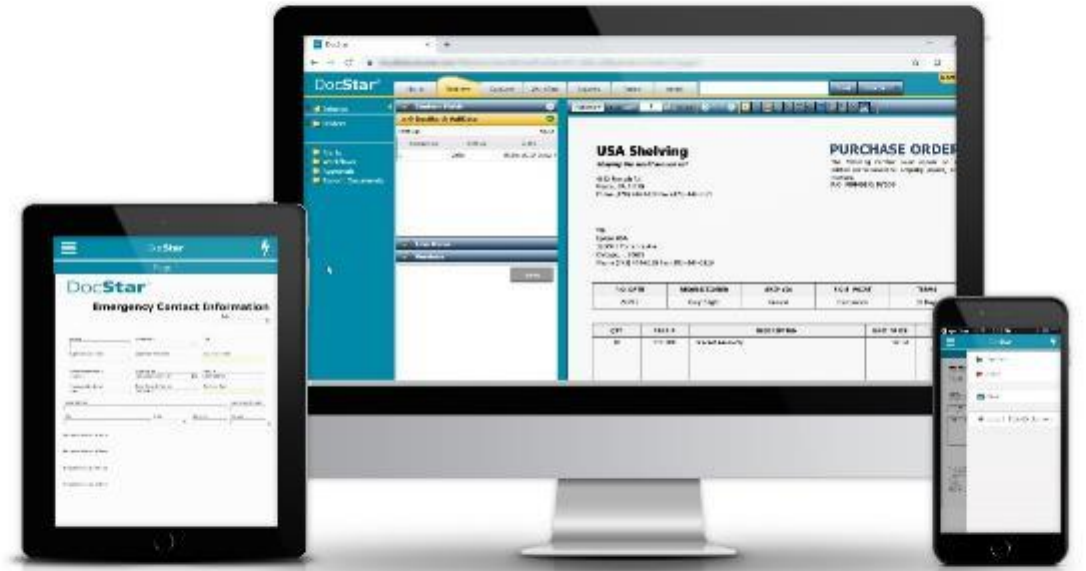


DocStar Enterprise Content Management 2020.1

Capture, validate, route and automate document processing



- ▶ Provides automation to route and process business documents more efficiently, faster and more accurately
- ▶ Integrates to Epicor ERP for storage of documents and attachments, pre-built automated processing of documents for sales order entry and accounts payable
- ▶ New features include AP Automation enhancements, integration with Epicor ERP identity, supporting multi-factor authentication and new Kinetic screens



Package Control Identification Transfers



Track, manage and transact a group of items through a unique ID

- ▶ Reserve and allocate Advanced Materials Management PCIDs for sales orders
- ▶ Enables customers to supply multiple sites with raw materials from a central location
- ▶ Allow a customer to receive a single PO line or job info multiple PCIDs in a single transaction





Epicor Quick Ship (Manifest)



- ▶ Cloud enablement on Microsoft Azure
- ▶ Data mapping tool
- ▶ New carrier integrations with:
 - CH Robinson's freightquote.com
 - Canadian carriers Loomis and Canada Post

Epicor Country Specific Functionality



▶ Countries providing updates for:

- China
- Colombia
- France
- Germany
- India
- Indonesia
- Malaysia
- Mexico
- Netherlands
- Norway
- Poland
- Portugal
- Sweden
- Taiwan
- Thailand
- UAE
- UK
- and all countries in the European Union (EU) with support for the EORI (Economic Operators Registration and Identification) number.

Epicor Electronic Reports

Meeting your business needs for electronic reporting



- ▶ Prepare electronic reports for third-party organizations
- ▶ Work efficiently with advisory companies and auditors
- ▶ Leverage simple e-invoicing
- ▶ Strengthen your global business management with legally required electronic reports

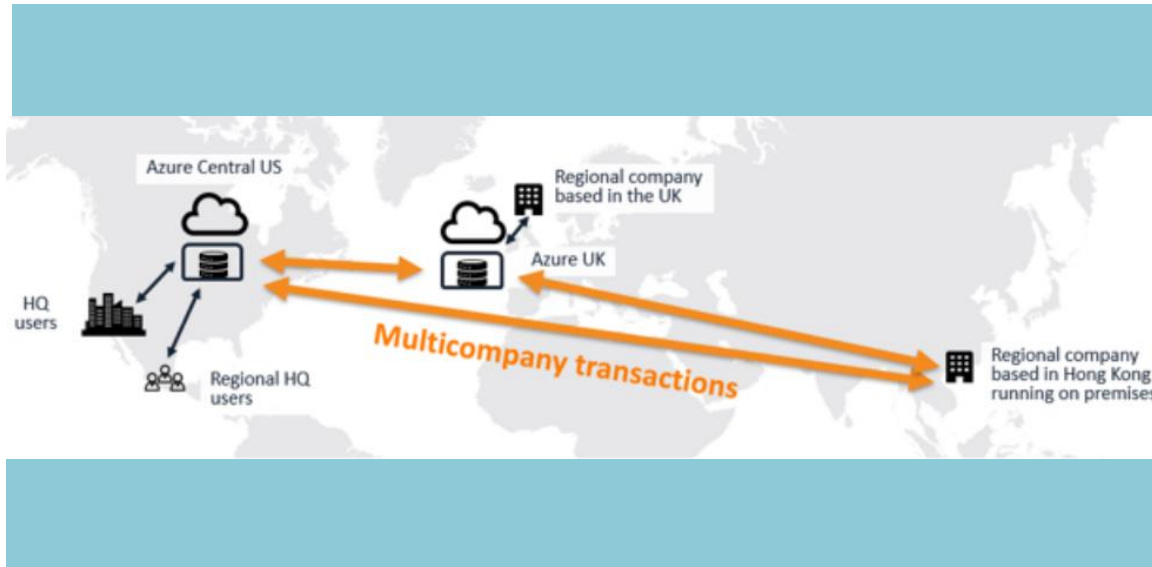


Epicor ERP Public Cloud

Multi-region Multi-company Transactions



Connect and unify your global manufacturing businesses



- ▶ Run Epicor ERP in multiple company locations from any geography, in the cloud or on-premises
- ▶ Enable intercompany transactions such as purchasing, sales orders and reporting across multiple databases
- ▶ Roll out a cloud strategy in phases, meet local requirements, and gain global visibility and alignment

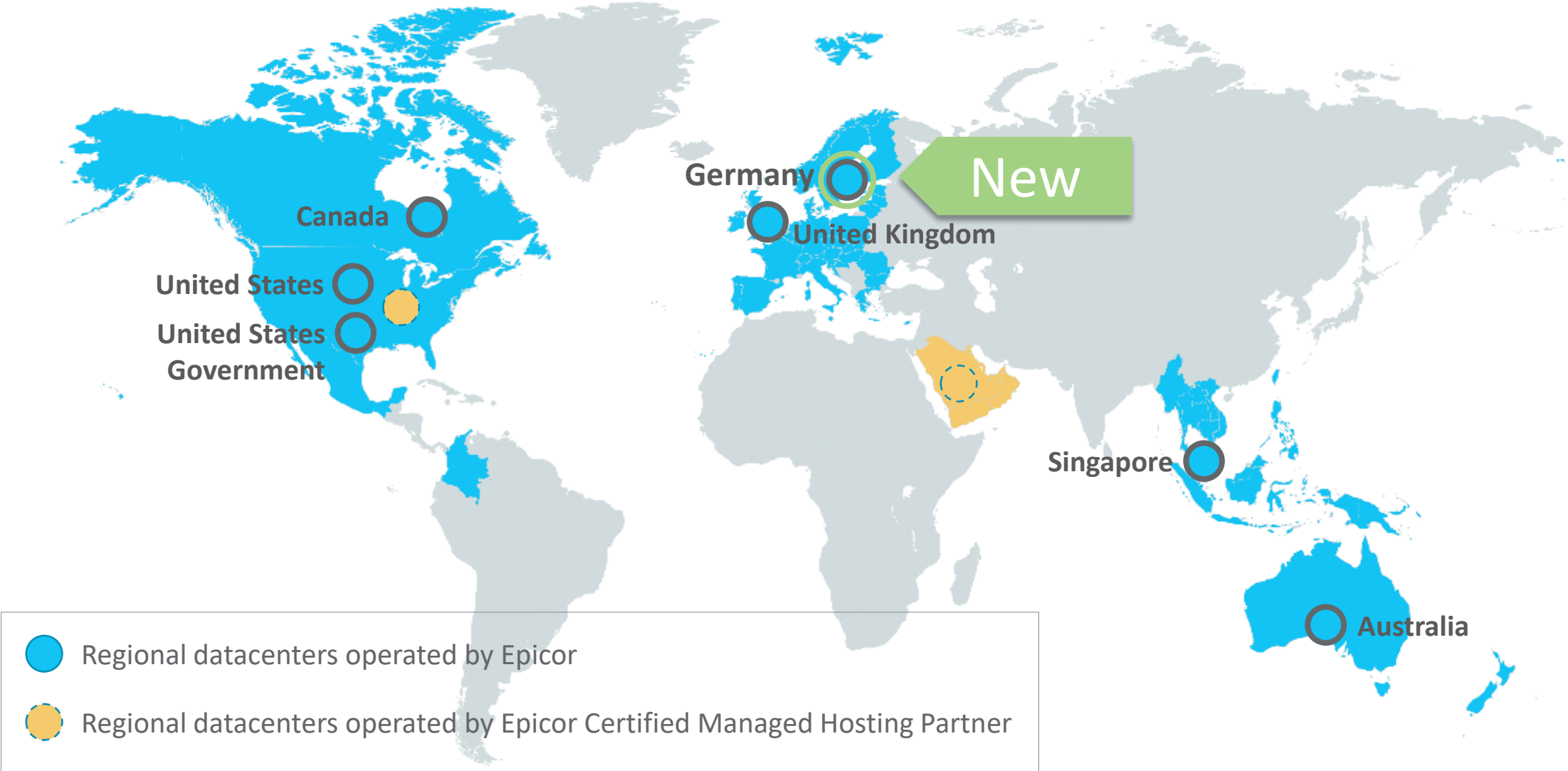


Core Cloud Enhancements

- ▶ Functions Enhancements – low code/no code customizations
 - Scheduling Functions
 - Functions calling other Functions
 - Solution Workbench support
- ▶ File Attachment Storage now supports
 - Google Drive
 - Dropbox
- ▶ Note: Microsoft has ended support for Windows 7



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

A screenshot of the 'In-App Notifications Preferences' form. The form has a blue header with the title 'In-App Notifications Preferences'. Below the header, there are several sections: 'Select Roles' with a note '* Received personalized messages tailored to your needs.', 'Titles/Levels' with a dropdown menu showing 'User - Power', 'Functions/Departments' with a dropdown menu showing 'Infrastructure & Tools', 'Type of Business' with 'Primary Sector' set to 'Manufacturing' and 'Primary Industry' set to 'Industrial Machinery Manufacturing', 'Select Interests' with two checkboxes: 'HF deployed in my area' (unchecked) and 'Provide feedback on new features' (checked), and an 'Email address' field containing 'Your@email.com'. At the bottom, there is a checkbox for 'Send notifications via email too.' (checked) and a 'CLOSE' button. A large orange arrow points to the email address field.



Epicor Cloud Status Webpage

<https://status.epicor.com>

EPICOR Subscribe to Epicor Cloud Status [Log](#)

Need to contact support? Click to open [EpicCare](#).

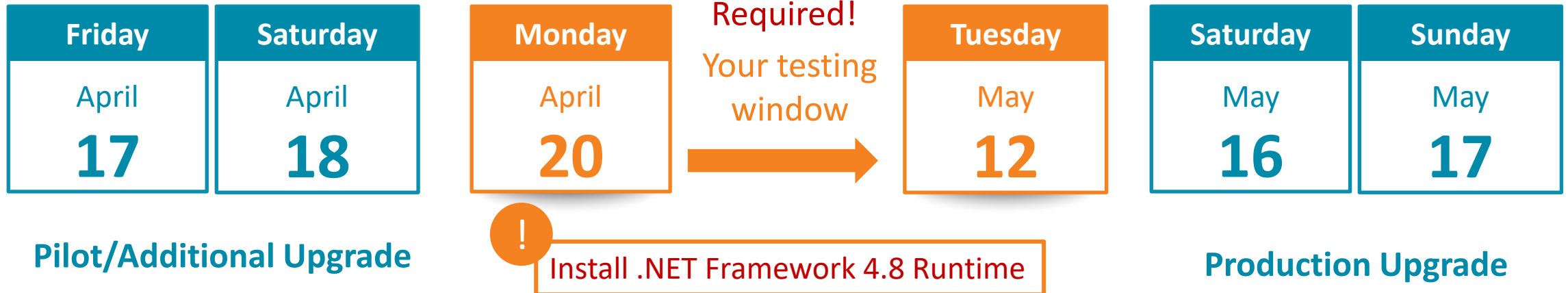
✔ All Systems Normal

Epicor ERP Cloud	Epicor Prophet 21 Cloud	Epicor HCM	Epicor Retail Cloud	Epicor Eagle	Epicor BisTrack	DocStar ECM	Epicor Commer Connect
< Apr 9 Apr 8 Apr 7 Apr 6 Apr 5 Apr 4 Apr 3 Apr 2 Apr 1 Mar 31 >							
Epicor ERP Cloud - Americas	✔	✔	✔	✔	✔	✔	✔
Epicor ERP Cloud - Australia	✔	✔	✔	✔	✔	✔	✔
Epicor ERP Cloud - Canada	✔	✔	✔	✔	✔	✔	✔
Epicor ERP Cloud - Southeast Asia	✔	✔	✔	✔	✔	✔	✔
Epicor ERP Cloud - UK	✔	✔	✔	✔	✔	✔	✔
Epicor ERP Cloud - Germany **NEW**	✔	✔	✔	✔	✔	✔	✔

A woman with long brown hair, wearing a grey blazer over a white top, is looking down at a tablet computer she is holding. She is in a meeting room with other people in the background, some of whom are blurred. The scene is brightly lit, suggesting an office environment. A blue horizontal bar is overlaid across the middle of the image, containing the text 'Upgrade Tasks and Timelines'.

Upgrade Tasks and Timelines

Timeline for 10.2.600



Your Preparation Checklist

Before your upgrade

- Attend the 10.2.600 Cloud Customer Webcast**
- Install .NET Framework 4.8 Runtime
- 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/Additional Env Upgrade Weekend

- ▶ **Pilot/Additional Systems offline Friday Morning 12:01 AM local datacenter time**
 - Not able to login during upgrade process
- ▶ **Timeline**
 - For *live* Public Cloud customers: We start copying your Production data to Pilot on Wed April 15 at 8:00 PM CDT and through Thurs
 - For *MT, Express*: We start copying your Production data to Pilot on Thurs at 8:00 PM CDT
 - Additional environments are not auto refreshed
- ▶ **When upgrades complete, your users are able to login**
 - Download happens automatically
 - No changes to Users \ menu \ permissions
 - 10.2.600 in Pilot system available for testing on Sunday, April 19



Production Upgrade 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 by Tuesday, May 12**
 - Send “all clear” messages
 - First to administrators, second to all users
- ▶ **When complete, your 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 May 29 if needed

A green arrow-shaped box pointing to the left, containing the word "Reminder" in white text. It is positioned over a stack of papers with a paperclip.

Reminder

A graphic of a stack of papers with a paperclip. On the right side, there is a calendar snippet showing the dates for the production upgrade weekend.

Saturday	Sunday
May 16	May 17

Production Upgrade

Data Refreshes for Customers in Public Cloud

- ▶ **All live customers** staying on cadence—your pilot database will be automatically refreshed Wed, Apr 15 and upgraded Fri, Apr 17
 - Additional environments are NOT automatically refreshed. But if you would like a refresh prior (so you test the latest data) please raise a ticket in EpicCare – this must be completed ASAP, to be ready for 12:01 Friday AM local datacenter time.
- ▶ **All implementing customers** –your pilot database will **not** be automatically refreshed. You will be upgraded on Fri, Apr 17 with the data in place.
 - But if you would like a refresh prior (so you test the latest data) please raise a ticket in EpicCare – this must be completed ASAP and ready for 12:01 Friday am local datacenter time.
 - 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 Thurs, April 16.

Customers with Option to Flex your .600 Upgrade

- ▶ Deadline was Wed, April 8 to submit your Flex request
- ▶ Updates:
 - Note: if you choose to defer your upgrade, you will NOT receive any scheduled 500.x updates after 10.2.500.10.
 - However, Kinetic forms (User interface refresh) will continue to be turned on during this Flex period, on a regular basis, with no downtime required

Customers with Option to Flex your .600 Upgrade

Option 1

- ▶ Week of June 22 – your pilot system will be refreshed from live and upgraded
 - Additional will be upgraded and not refreshed. But if you would like a refresh prior (so you test the latest data) please raise a ticket in EpicCare – this must be completed ASAP and ready for 12:01 Friday AM local datacenter time.
- ▶ Saturday, July 25 at 12:01 AM – your live system upgrade will start

Option 2

- ▶ Week of July 20 – your pilot system will be refreshed from live and upgraded
 - Additional will be upgraded and not refreshed. But if you would like a refresh prior (so you test the latest data) please raise a ticket in EpicCare – this must be completed ASAP and ready for 12:01 Friday AM local datacenter time.
- ▶ Saturday, Aug 22 at 12:01 AM – your live system upgrade will start

Testing in Pilot

Ensure your critical operations are tested and ready for upgrade

- ▶ Use this time to test end-to-end
 - A sample test plan is available for download on EpicWeb
 - Personalize the test plan and distribute to your power users
- ▶ Monitor for any failed Unique Business Components (UBCs)
 - **Tues, May 12 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*)
- ▶ Pilot/Additional will be upgraded to 10.2.600.2 May 12 just prior to the Live upgrade May 16-17
- ▶ If you need help, please submit an EpicCare ticket

Reminder



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 10.2.600

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 Tuesday, May 12
- Create an EpicCare Ticket if YOU WANT* Epicor Cloud Ops to move your UBCs from Pilot to Production for you

Reminder

*In 10.2.400 and earlier, Epicor moved your modified UBCs files automatically, **unless you opted-out** by requesting that they **not** be moved. Like the 10.2.500 process, with 10.2.600 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

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 Curr
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 Curr
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 Curr
Warning	<input checked="" type="checkbox"/>	Part Tracker R1	KS 20171812 14316	App.PartTracker.PartTrackerForm		Productization^PartTrackerForm	3/13/2018	w3.2.200.0	<input type="checkbox"/>	<input type="checkbox"/>	Not Valid For Curr
Warning	<input type="checkbox"/>	PARTTESTBO	UDPARTTESTBO	App.PartEntrv.PartForm	UD Part Test	Productization^PartForm	3/13/2018	w3.2.200.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Valid For Curr
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
- ▶ Access 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 Help and EpicWeb Cloud Documentation	EpicWeb Cloud Documentation	EpicWeb Cloud Documentation



Training Courses

Structured and repeatable learning experiences

- ▶ **Epicor ERP Cloud 10.2.600 features over 60 new and updated titles in our Training on Demand library**
- ▶ **Epicor ERP Cloud Embedded Education has over 100 courses with several updates**
- ▶ Remember to leverage the cloud upgrade 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



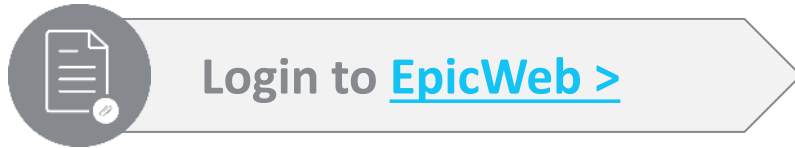
You are invited

We want to hear from you

- ▶ Respond to the Epicor ERP Product Survey
- ▶ Participate in the Cloud Feedback program
 - Test and send feedback on new features and products new releases
 - Contact me
Kerrie.Jordan@Epicor.com

Your Resources

10.2.600 Documentation



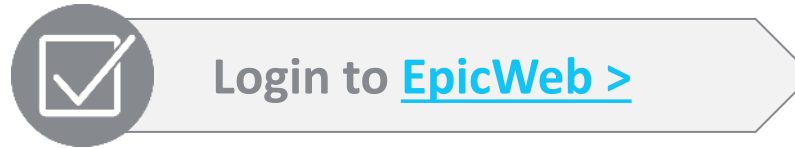
▶ Feature Summary

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

▶ Change List

All changes listed by Functional Area, available on EpicWeb

10.2.600 Upgrade Guide



▶ Upgrade Guide

Step-by-step guide for a successful upgrade

If you need help...



▶ EpicCare ticket

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

Q & A

Submit questions in the
WebEx Q&A panel.