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Engage Workers and Drive Greater Productivity Simply With Epicor Collaborate

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Future of Work

Anywhere | Highly automated | Responsive | Collaborative

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"The rise of the collaborative workforce and workspace is underway. Increasingly, tech-savvy mobile users are ready for collaborative workspaces with deep integrations to the software they use daily. Collaboration is a key element that helps create the future of work,"

Wayne Kurtzman | Research Director | IDC's Social and Collaboration Solutions
Worldwide Team Collaborative Applications Forecast, 2019–2023: Collaboration Growth Impacts the Future of Work

Epicor Solution for the New Now

Workers desire rich collaborative interactions, reducing silos and **working in teams** for greater satisfaction.

Business looks to do more with less, driving the need for **greater productivity** for workers across business processes.

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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.

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Introducing Epicor Collaborate

▶ Cloud-based solution

▶ Messaging for the Enterprise

▶ In-app, easy to use

▶ Little to no training needed

▶ Take action instantly @callouts

▶ Don't monitor, be *notified* of ERP events (Standard, BPM, IoT, Custom)

▶ Shared metrics

▶ Work in teams, including external members with MS Teams integration

▶ Available in 11 languages worldwide

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Simple to Get Started

First

Next

Final

Order Epicor Collaborate

Apply a license & **select** a datacenter for your data

(Closest to your base operation)

Educate users on best practices and use

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Collaborate for Industry

Estimator

"Getting ready to send out $100k worth of quotes @buyer could you verify no recent material price fluctuations? **@EVA** what is the status of the ABC Metals PO?

Rapid Response Team

Received **notification** from Epicor IoT that equipment is running "hot". Maintenance **team** is already on it and connected with supplier for resolution.

Finance

Reviewing quarterly financials and noticed our discretionary spending is high. **Sharing the metrics** and data with sales quickly resolved the problem.

Management by Exception & Amazon Effect

Traditional Reporting

Nightly reporting of events.
Static and outdated once run.

Dashboards

Near instant refresh
Users periodically monitor

Collaborate Notifications

Users subscribe & notified
Easy @followup

Amazon Effect introduces the need to be notified.

Standard Notification Rules

Customers	Orders and Quotes	Shipments	Jobs	Finance and Other
• Customer updated • New customer • Customer group changed • Customer on credit hold • Customer taken off hold	• Order line created • Sold to changed • Large order • Large discount • Order held • Quote has been quoted • Quote has expired • Request for quote received	• Shipment closed • Shipment freighted • Shipment shipped • Shipment ready for invoice	• New job • Job completed • Job engineered • Comments • Job operation completed • Job assembly issued complete • Project milestone completed	• AR invoice created • Debit memo created • Task assigned • Task completed

Be careful in subscribing to ensure you don't get data fatigue

Personal Benefits

Business Benefits

Personal Benefits	Business Benefits
Email inbox is smaller	More productive
Reduced status meetings in Calendar	More productive
Stay informed and action @faster	Customer responsive
Onboard easier with shared knowledge	Attract new talent
Employees in silos are now engaged	Attract new talent
Notified in lieu of monitor exceptions	More productive

Demonstration – Jeff

Who are your digital champions?

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Building Strategies for Digital Transformation

Communication types

Face to Face
Phone
Email
Digital Messages

Management by Exception

Tracker
Dashboard
Collaborate Notification

Teams and Members

Estimates (sales | quoting, engineering, procurement, finance)
Production (engineering, quality, material handling)
Field (technicians, engineering, production, quality, procurement)
Customer Service (CSR, quality, finance, engineering)

ADP Report: ADP Anticipates 2020 to Deliver Smart and Personalized Work Experiences for Workers and Employers

"A team-based approach will change how work gets done.

Organizations of all sizes need to break down siloes to unlock potential and create a culture of connectivity predicated on engagement and performance."

November 25th , 2019

ADP, LLC

Demonstration on MS Teams Integration – Mike
Note: MS Teams integration is in Preview today and available to all Epicor Collaborate Users

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Work-focused Collaboration

"Our employees can work within the ERP system, create orders, communicate with colleagues, and engage in work-focused 'talk-like' conversations using Collaborate. The conversations and supporting information is stored in one system, with the ability to click on content within messages. Collaborate is not focused on just the office environment, but available throughout the system."

Jos Greeve, Group IT Manager
Boers & Co FijnMetaal Groep

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Notifications Replace BPM
(Controlled Release Customer)

"Data notifications in [Epicor] Collaborate are valuable. Lots of people want to know when a part is created, or invoice posted. This replaces a common BPM I'm asked to create.

People love messaging. It's less hassle than picking up the phone and "chats" in email are a nightmare."

Peter Cunningham, CIO
Liberty Pumps

Liberty Pumps®
A Family and Employee Owned Company

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Teams Collaboration
(Epicor Global Channel Partner)

"This is a great extension of the product … Team communication and team building are critical. [Epicor] Collaborate translates into efficiency gains and expands on the workflow platform while incorporating other channels."

Gonzalo Nunez, President
Technology Coast Partners, Llc
Epicor Global Channel Partner

In Summary

▶ Collaborate **drives your digital transformation** with new tools workers expect

▶ Easy to deploy and use, the **time to value** is instant

▶ Drive new **efficiency for workers** by reducing the noise of email and meetings and replace with robust notifications

▶ **Eliminate the silos** in your organization so your workforce can effectively work in cross-functional teams to **deliver greater innovation**

▶ Shared business metrics are actioned faster for **greater productivity**

▶ This cloud-based solution is available in 11 languages worldwide offering **availability for all**

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Questions

Contact your CAM for brochure, FAQ, pricing on this exciting solution

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Frequently Asked Questions

▶ What version of Epicor ERP do I need to add Epicor Collaborate
  - 10.2.500+

▶ Does Collaborate work with Epicor ERP on premises or cloud?
  - Yes

▶ If I have social enterprise today, do I get Epicor Collaborate when I upgrade to 10.2.500
  - Epicor Collaborate is a SaaS offering only and must be purchased separately from Epicor Social Enterprise

▶ Can I use both Social Enterprise and Epicor Collaborate at the same time
  - Epicor does not support this configuration in a production environment

▶ Is there a migration of data from Social Enterprise to Epicor Collaborate
  - There is no data migration available. Epicor professional services is able to assist existing users of Social Enterprise on a case by case basis

▶ Does Epicor Collaborate work across plants and companies?
  - Yes, but you can only see the data from the company you are logged into.

▶ If I start using Collaborate in an on premises deployment with 10.2.500 and Epicor upgrades to 10.2.600, does Collaborate stop working?
  - No, the beauty of having a cloud solution is that we upgrade your functionality for you and you get to start using some of the new features immediately, even though you are still on 10.2.500.

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