Epicor XL Connect

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Customer Webcast, Americas region, April 1, 2020

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- At the end of this session we will discuss some of the questions

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Agenda

Introduction

Reporting challenges in the New Now

- *Why reporting is more important than ever and what reports you should be looking at*

Leveraging pre-built reports

- *See how pre-built report templates can provide rapid time to value and instant data access in these uncertain times*

Enabling remote workers

- *Enable remote workers with self-service access to data and automated report distribution*

Live demo

Next Steps

Q&A

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Reporting Challenges in the ***New Now***

Get a handle on costs in the short term while answering new questions that arise in the coming weeks

- Increased demand on finance teams for quick answers to changing business conditions
  - Real-time data access is critical
  - More frequent reporting cadence is necessary
  - Drill-down capability is necessary
- Increased demand for ad-hoc reporting and “What-If”/ Scenario Planning
- Ability to enable remote workers
  - Need for self-service data access and less dependency on IT
  - Automated report distribution is key

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How Can Epicor XL Connect Help?

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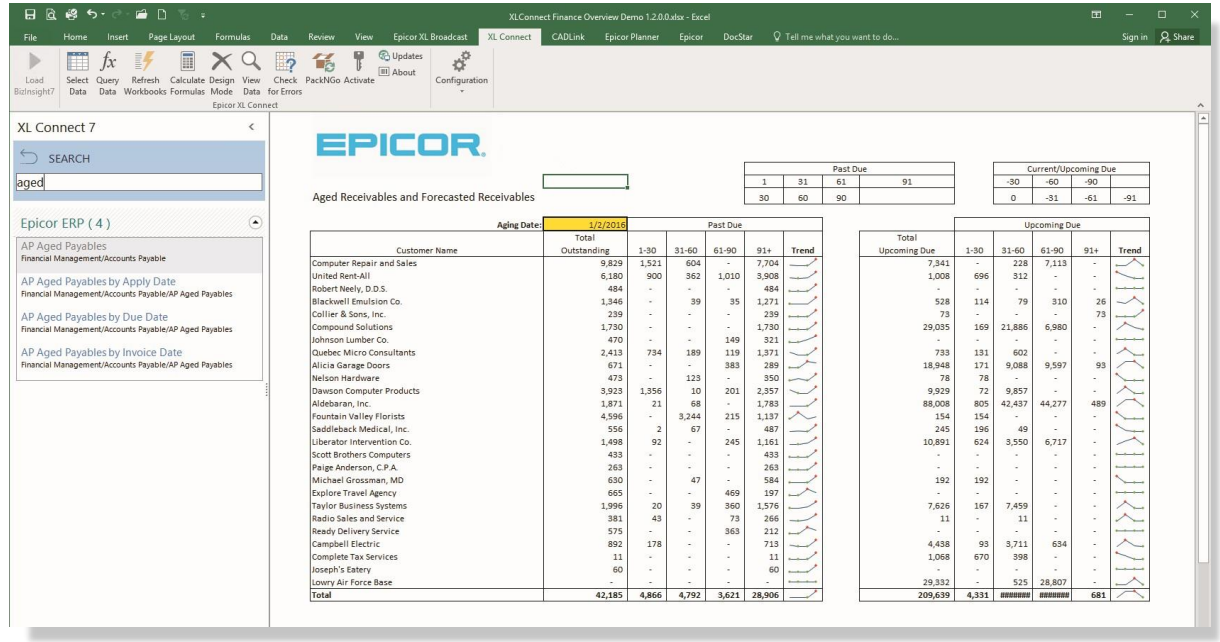
Epicor XL Connect

BizNetsoftware®
an insightsoftware company

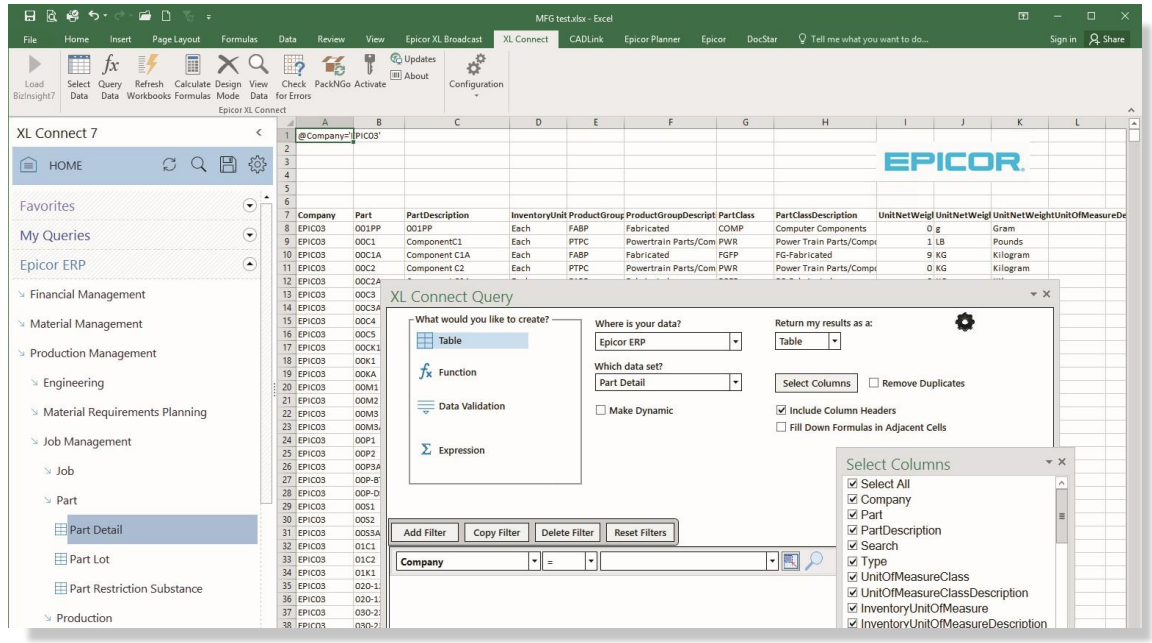
- Powerful real-time Excel reporting for financial users as well as for all business users
- Delivered by insightsoftware, an ISV alliance partner of Epicor
- Excel Add-In without any additional hardware needs
- Integrated to the Epicor ERP system



Epicor XL Connect

BizNetsoftware®
an insightsoftware company

- Out-of-the box functions that work with Excel
- Present information as you wish – full flexibility with formatting in Excel
- No need to be able to know database tags or be IT savvy in order to create reports
- Rapid report generation with in-memory data caching



Leveraging Pre-built Reports

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The Reports You Need to be Looking At

Utilize pre-built report templates for critical reports to realize rapid time to value out-of-the-box

- **Rolling Cash Flow Statement** – Provide cash balance visibility on the next key reporting date
- **Payables Aging** – Easily monitor when debtor liabilities are falling due
- **Receivables Aging** – Manage cash flow y forecasting future collections
- **Vendor Analysis** – See actual spend by supplier in real-time
- **Receivables Applied Receipts** – Track customer receipts to ensure collections are on schedule
- **Inventory Analysis** – Easily gain insight into on-hand inventory and turnover

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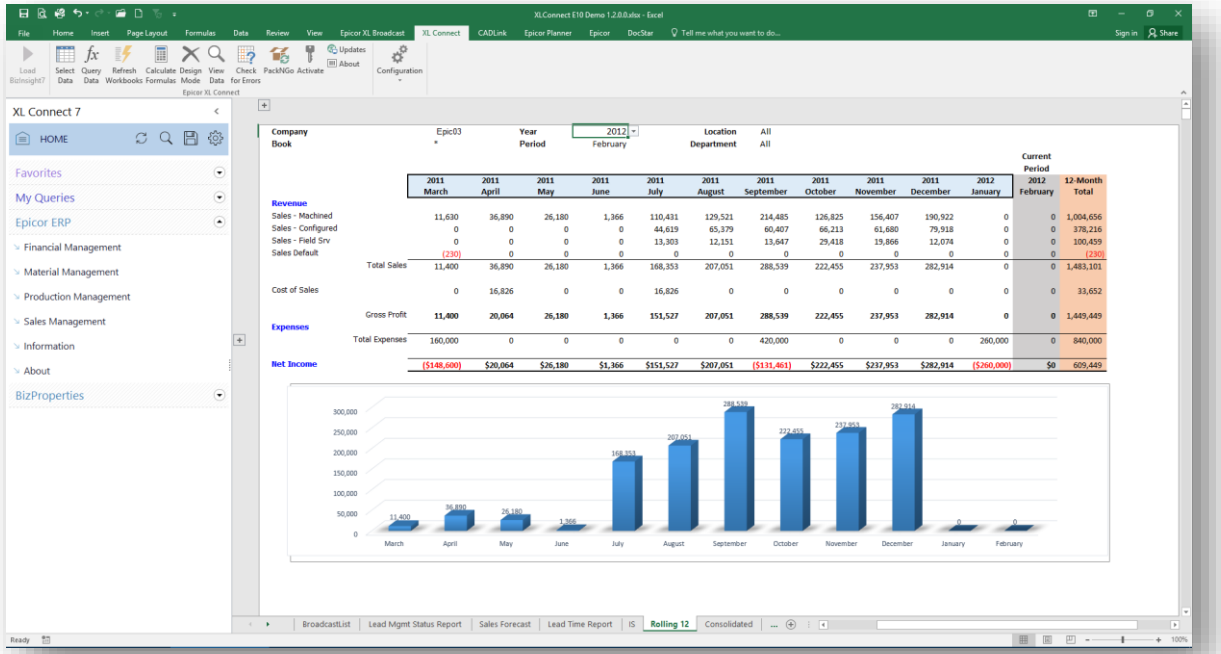
Pre-built Reports



- No Longer just Financial! Includes all Epicor data
  - Prebuilt connections to 20 Epicor ERP modules
  - **45 out-of-the-box reports** for Financial, Sales, Production, and Material Management

Enabling Remote Workers

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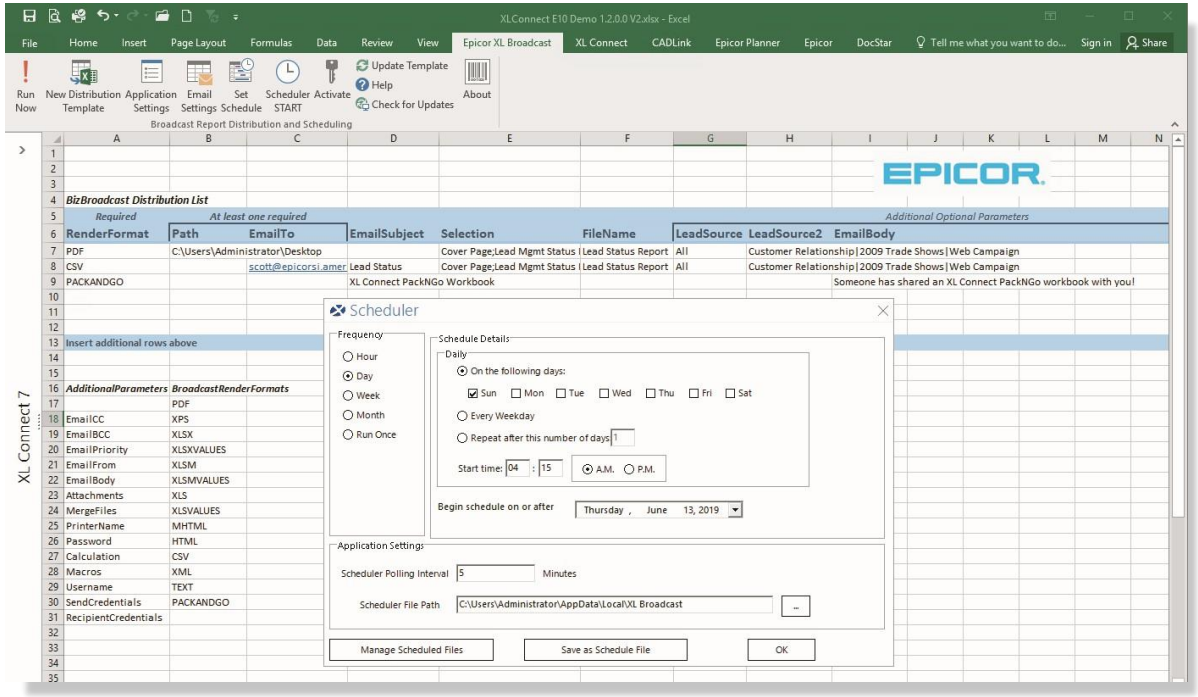
Enable Remote Workers

Access the right data, anywhere by enabling remote workers with self-service data access and automated report distribution



- **PackNGo** feature gives fully functional XL Connect 7 reports even offline
- **Broadcast reports** in a variety of formats and frequency

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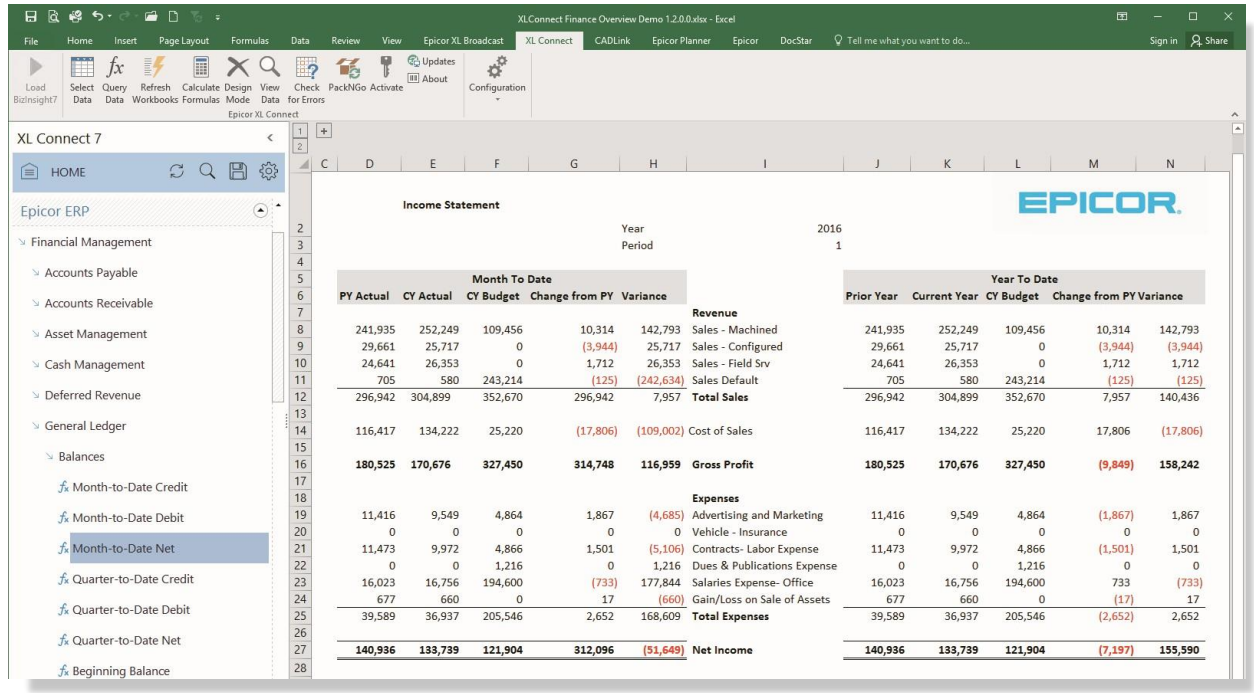
Enable Remote Workers

Access the right data, anywhere by enabling remote workers with self-service data access and automated report distribution

- Every user is a report designer
- User/group based security model
- Customize XL Connect 7 in-memory caching for greater performance
- **Create XL Connect 7 reports utilizing any Excel data source**
  - BAQ REST API, CSV, ODBC and more
- Every user can create new custom XL Connect 7 functions



“We’ve been able to do our financials in 20 seconds. Don’t tell my boss though, because I still tell her it’s three days!”

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Live Demo

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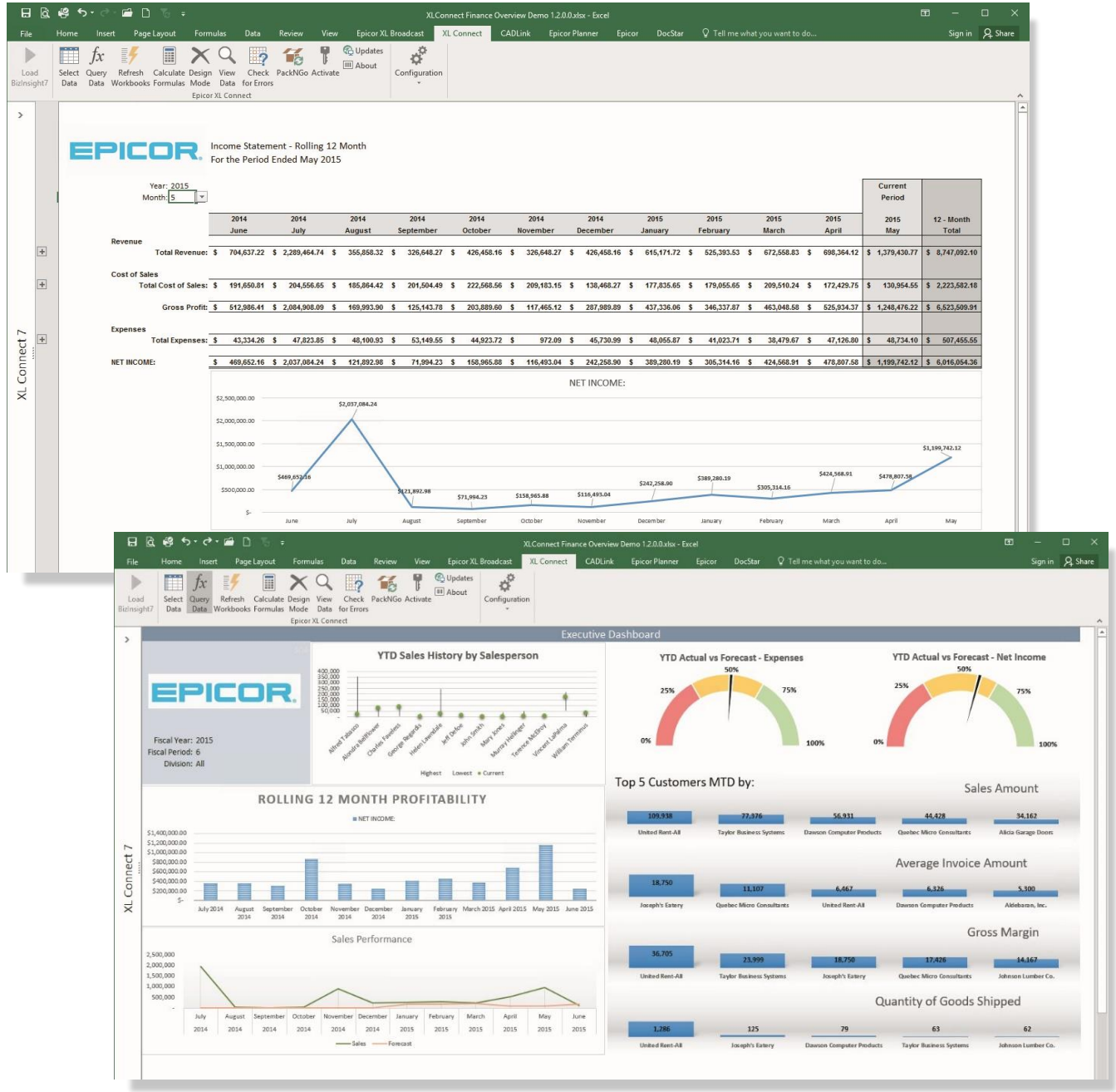
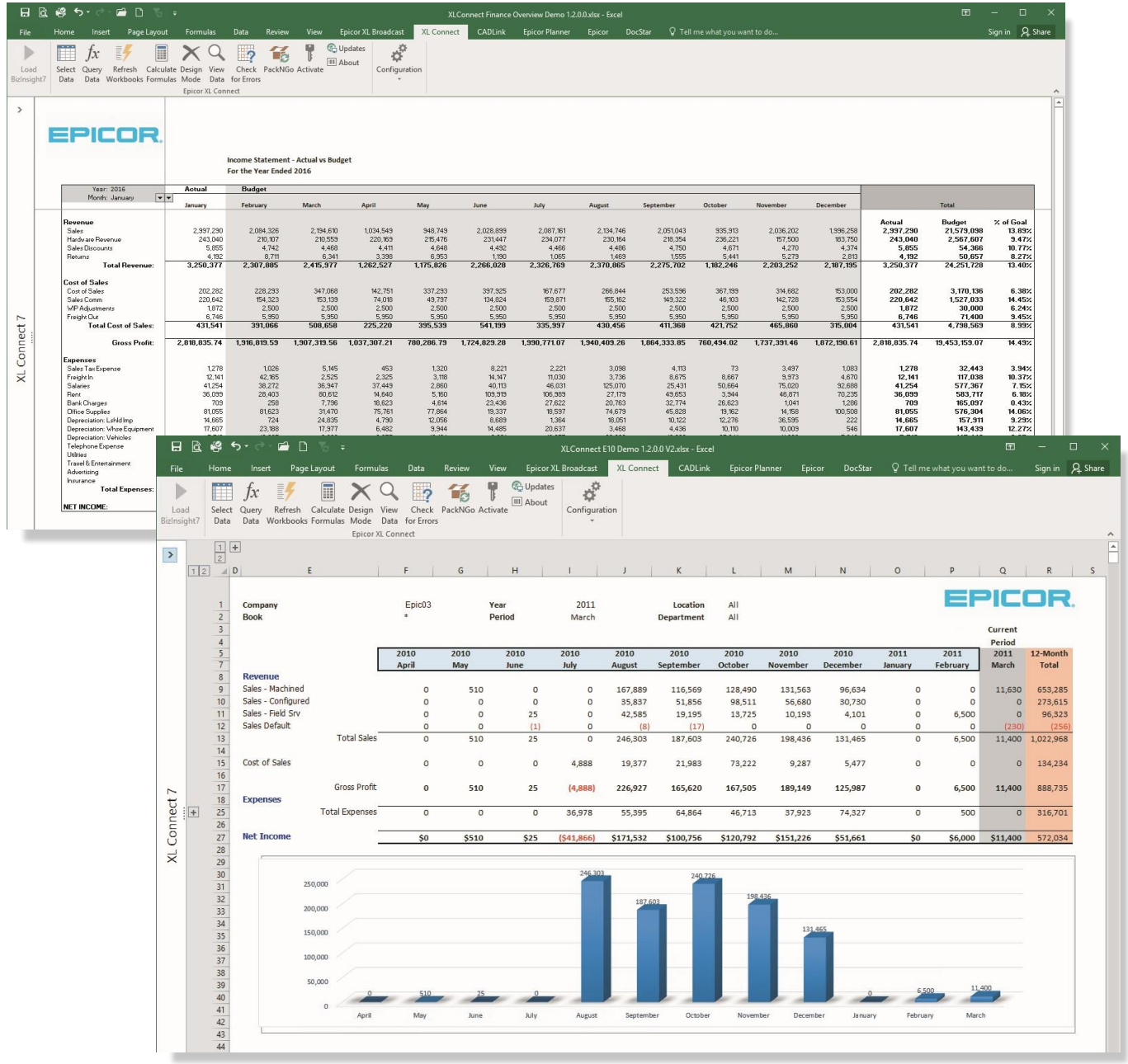
Key Capabilities

- 100% compatible with Excel (add-in)
- Direct access to:
  - Epicor ERP data
  - External data sources
- Drag-and-drop report creation
  - Functions
  - Analysis sets
- Self-service report creation



Key Capabilities

- Leverage existing spreadsheets
- Consolidate companies from different databases
- Multi-dimensional drill-down
- Supports
  - Pivot tables
  - Custom calculations
  - Charts



User Types

Epicor XL Connect 7 User Types

- **Live User**
  - Full access to Epicor ERP data and can leverage multiple data sources
  - Includes built-in features that automatically create PivotTables for detailed analysis
  - Can package an arbitrary data set and distribute to remote users via PackNGo
- **Remote User**
  - Create their own ad-hoc reports, functions and analysis based on data allowed to them
  - Drilldown and view the details behind the numbers
  - Access to their data anytime, anywhere with fully interactive reports - even if offline
- **Broadcast**
  - Automated delivery of entire workbooks or designated worksheets to one or many recipients via e-mail, file folder, Microsoft SharePoint

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Epicor XL Connect 5 to 7 Migration Path

Epicor XL Connect 5	Epicor XL Connect 7	Licence	Maintenance
Starter Pack 1 Designer, 2 Power, 4 Drilldown	3x Live 4x Remote	50% off SLP 100% off SLP	20% SLP 20% SLP
Designer User	Live User	50% off SLP	20% SLP
Power User	Live User	50% off SLP	20% SLP
Drill Down User	Remote User	100% off SLP	20% SLP
AR Content Pack AP Content Pack MC Content Pack XL Connect Developer	N/A N/A N/A N/A	N/A N/A N/A N/A	N/A N/A N/A N/A

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Next Steps

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Resources

- Landing page
- Interactive Demo
- BAQ & REST API Webinar
- Fact Sheet
- Fact Sheet on Broadcast user

Videos:

- Feature Spotlight – PackNGo
- Self-service Business Intelligence & Reporting
- Epicor XL Connect 7 for Analysts
- Epicor XL Connect 7 Demo
- Questions Answered with Excel Connect 7

Customer Success videos:

- Axelgaard Manufacturing
- Jamco America
- Baxter Manufacturing
- Heath Consultants

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Did You Know?

Epicor Learning Center has 10 Training on Demand Videos to help you master Epicor XL Connect

Epicor University

Knowledge is power | Unlock your potential

Questions and Answers

Please enter your questions in the Q&A window

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