

Upgrading Your ERP Software

4 compelling reasons why it is essential to make the move to Epicor ERP 10



EPICOR.

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The Cost of Waiting

Keeping up with Epicor ERP upgrades has allowed us to reinvent our business strategies.

—Daniel Dailey | Philadelphia Mixing Solutions

As elegantly expressed above, Philadelphia Mixing Solutions has a simple, powerful reason for consistently taking advantage of available Epicor ERP upgrades since it first adopted the solution back in 2008.

The same reason explains why most Epicor customers have already moved to Epicor ERP version 10, and why you should be planning your upgrade, too, if you haven't made the move yet.

Leaders, laggards, and evolving ERP

Think of all of the reasons you chose Epicor ERP in the first place. Perhaps it was for greater visibility, efficiency, and productivity. Perhaps it was as a foundation for innovation, transformation, and growth. In a world increasingly shaped by digital transformation and Industry 4.0 technologies, every year brings smarter ways to achieve all of these objectives. It's only by evolving along with technology that you can take advantage of change—and stay competitive.

Businesses that upgrade outperform those that don't

Aberdeen Group has found that it's not just about having an ERP solution or not. Those who move to the latest version of their ERP system perform better than those using an older platform, in everything from days sales outstanding (DSO) to customer satisfaction.

	Days sales outstanding (DSO)	Accurate financial reports	Customer satisfaction	Information received during decision window (% time)
Legacy ERP	42.9	89%	88%	82%
Latest ERP	33.3	96%	93%	90%

Source: "The cost of doing nothing: why you can't afford to sit on an ERP software decision," Nick Castellina, Aberdeen Group, March 2017

Grow Getters invest in growth

'Grow Getters' is our name for manufacturers that are determined to be among the leaders rather than the laggards when it comes to continuing to transform and grow their businesses. They cite better technology and more efficient working practices as the two most important considerations in achieving business growth.¹

Talking specifically about their move to Epicor ERP 10, here's what some of these Grow Getters have said:

Epicor has helped us evolve in how we keep up with our customers, and put us in a great position to help us grow as we embrace the future of manufacturing.

—Gary Fruth | Dalsin Industries

What was easy before just got easier with the newest version of Epicor ERP.

—Bruce Palmer | Precision Products

Epicor has inspired our business by bringing all our employees together and getting them all on the same page—which is extremely difficult to do—from the front office all the way back to the shipping dock.

—Douglas Horner | Enpress LLC

Benefits of upgrading

In these pages, find out more about how and why your business will benefit from moving to Epicor ERP 10.

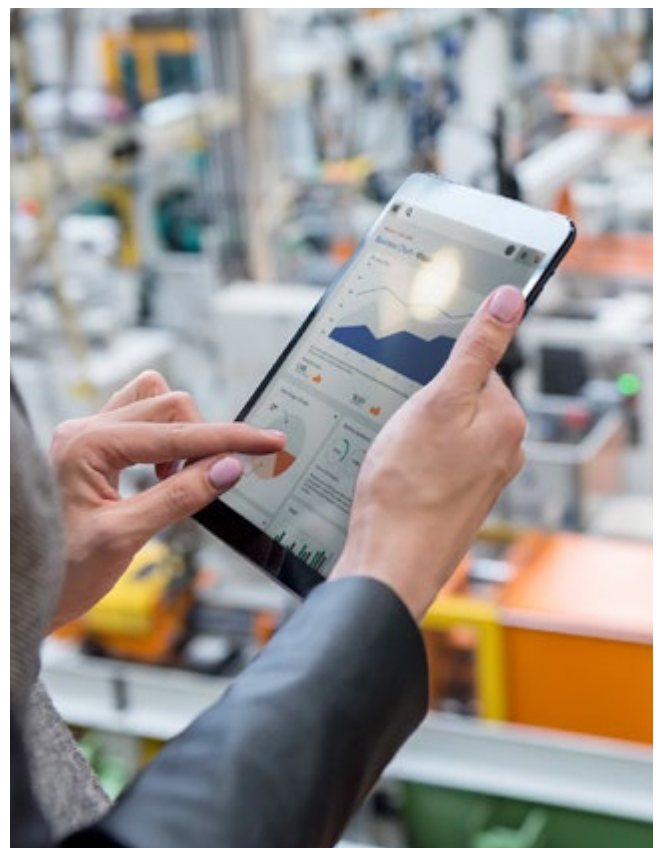
► **Ease of upgrade**

We've worked hard to develop tools to simplify the move and minimize disruption.

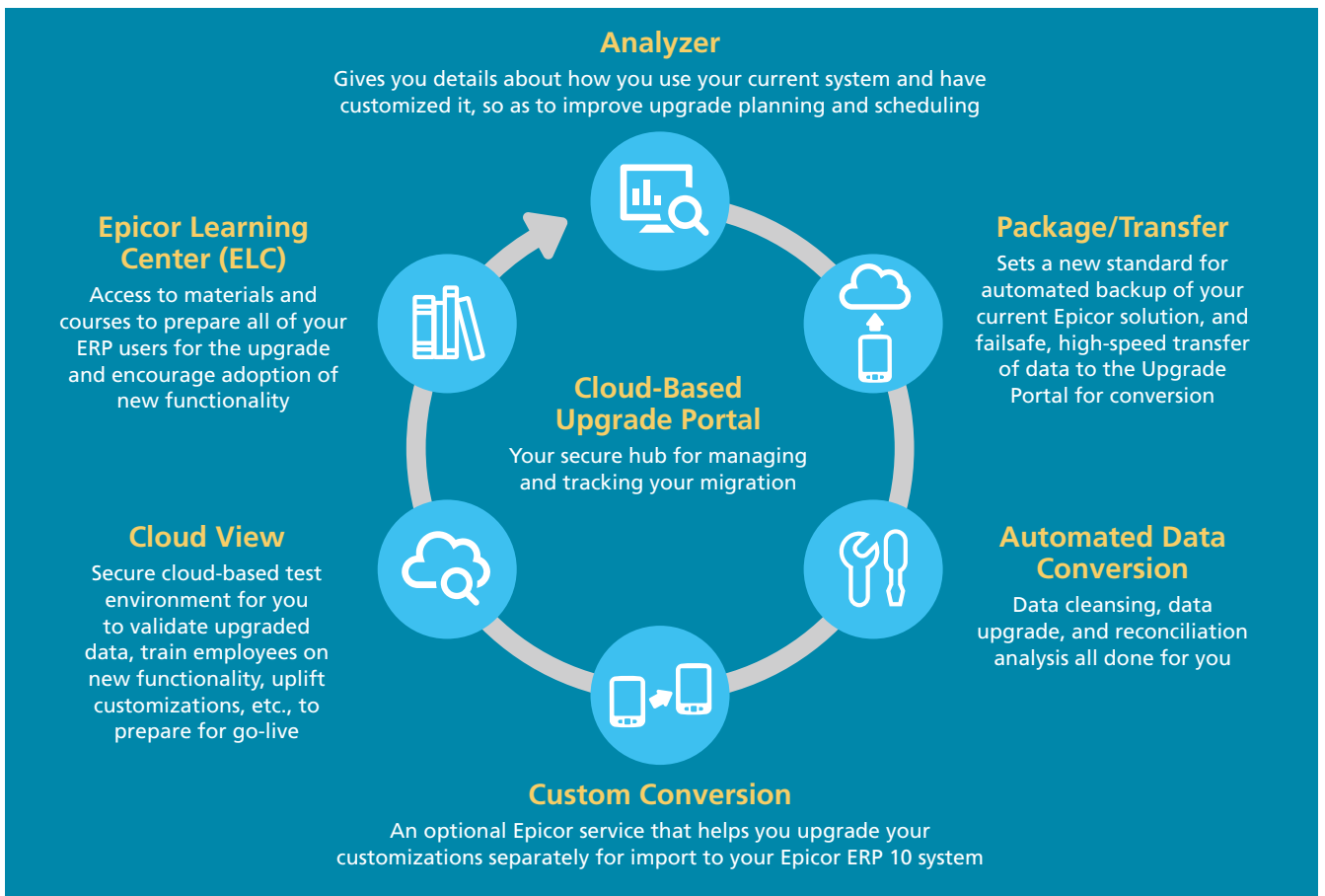
► **Business value**

Digital transformation is a continuing journey for everyone. Each iteration of Epicor ERP helps you to continue the journey more effectively by delivering new and better functionality. With Epicor ERP 10, you'll unlock:

1. **Greater connectedness**—opening up smarter ways of working that enhance productivity and customer service
2. **Operational efficiency**—empowering your people to deliver better results, faster
3. **New levels of cloud-readiness**—giving you greater business flexibility to evolve as you want
4. **Business assurance**—ensuring peace of mind for your business and the confidence to grow



¹ MORAR Growth Survey 2016



Get Set for Growth With a Simplified Upgrade

Some businesses delay upgrading to a more advanced ERP because of fears that the project will be too disruptive, painful, and costly. By doing so, they deprive themselves of numerous benefits and unnecessarily so.

Hundreds of businesses can tell you how pleasantly surprised they have been at the ease and speed of their move to Epicor ERP 10. We've specifically developed a methodology and tools that dramatically simplify the process and minimize business disruption.

A bit about how it works

The plan is to move what you currently have—which can include your customizations—onto a platform that gives you new capabilities immediately, and can better support your transformation goals going forward.

We will work with you to plan the move, validate your readiness (both technically and in terms of user readiness), and deploy Epicor ERP 10. We'll provide appropriate project management support, technical and business consulting, migration services, and go-live support—all to minimize disruption and cost. If you've remained current on maintenance, you've already paid for your software license through annual maintenance fees.

The simplest migration process I have been a part of.

—Anthony Gercar | Enpress LLC

1 Connectedness

Embrace smarter ways of working



When Aberdeen Group asked businesses for the reasons they had chosen to upgrade their ERP, more than half (55%) cited that they wanted to take advantage of new functionality. No other single reason was nearly as big a driver.

This makes perfect sense when you consider how new technologies and new ways of working—whether you think of them as digital transformation or Industry 4.0—are changing the game. Many do so by creating new levels of connectedness. They bring people and systems together in a multitude of ways for greater productivity and better customer service.

I can now walk around the plant with my tablet PC, schedule machine run times with a few taps of my fingers, and give back an hour to supervisors.

—Anthony Gercar | Enpress LLC

Enpress collaborates better through social manufacturing

Enpress has installed two large LED displays—one near the time-clock area and the other where finished goods are packaged—to enable employees to communicate with each other in real time on project status and other developments.

Messages are organized in groups such as accounting, maintenance, manufacturing, and shipping, allowing users to read and respond to those that are relevant to their specific focus areas.

“We are embracing communication with Epicor Social Enterprise ... The second and third-shift teams love it because they know their messages will be reviewed quickly. It’s like having our own type of Twitter,” said Anthony Gercar, plant accountant at Enpress.

Connectedness and Epicor ERP 10

Your employees, suppliers, partners, and customers have new expectations for your business to meet:

- ▶ Can your people pull up the information and insight they need on their smartphones or tablets wherever they are—at home, on the factory floor, in a customer meeting—to respond immediately to a business or customer need?
- ▶ Can they subscribe to real-time notifications about production orders, customers, inventory, invoicing, or whatever else is relevant to their job?
- ▶ Can you extend real-time visibility to suppliers, partners, and customers—for example by integrating your ERP system with your eCommerce activities or building a partner portal?

When you move to Epicor ERP 10, these capabilities become possible.

Grow Getters respond to changing customer demands

80%



of high-growth companies cite changes in customer demands as having a critical impact on their ability to achieve growth in the next 12 months

Source: MORAR Growth Survey 2016



With the mobile capabilities of Epicor ERP 10, your people will have what they need wherever they need it.

Imagine what happens to customer service and satisfaction if, for example, sales can use real-time visibility into stock and pricing to process an order on the spot. Imagine if your goods arrive faster because those in production, warehousing, and shipping are no longer tied to a particular spot to interact with Epicor ERP 10.

When you upgrade, you not only get much-improved browser-based access to all Epicor ERP 10 functionality, but a number of specific mobile apps, including:

- ▶ **Epicor Mobile CRM** for even easier access to the entire suite of CRM capabilities (for those using Epicor CRM), enabling sales to manage the customer journey from lead to order.
- ▶ **Epicor Data Discovery (EDD)** for up-to-the-second, short-term visualization and on-the-go analysis of what is happening in the business. We know that people can typically spot points of interest more quickly when data is presented visually than in tables, so we've made it happen—on mobile devices and giant screens alike.

EDD can use any type of data held in Epicor ERP 10, including sales, financial, production, and shipping. Users can customize existing visualizations, and drill down into any data point to view the underlying transactional detail. EDD brings insight to everyone, everywhere.

Epicor Commerce Connect (ECC) is an optional eCommerce module available through the Epicor ERP 10 platform. With the global B2B eCommerce market expected to be worth \$6.7 trillion by 2020, leading B2B companies are prioritizing eCommerce and customer self-service.² Epicor Commerce Connect helps small to midsize manufacturers step up to this challenge by simplifying the development of sophisticated eCommerce and partner sites that can compete with the best.

Because your ECC sites will automatically be integrated with your Epicor ERP system, you can—for example—offer customers or channel partners the ability to customize product configurations, or show them real-time stock availability without any special effort. You can confidently offer a range of self-service capabilities and flexible buying options that will help you connect more effectively with customers, partners, and suppliers to meet their changing expectations.

² "B2B Ecommerce Market Is Still Maturing," eMarketer, August 2016





With Epicor Social Enterprise you can push relevant real-time notifications to employees or suppliers who want to receive them, making it even easier for them to stay on point.

Employees can also use social messaging functions to reach out to colleagues, crowdsource ideas, and respond more quickly and effectively to issues or customer needs. Managers, too, get a greater level of insight through these social discussions. This kind of interaction and insight delivers results—Aberdeen Group has found that those with social ERP are almost three times more profitable than those without.

Those with social ERP improve more than those without



twice the improvement in time-to-decision and cycle time of key business processes



almost three times the improvement in profitability

Source: "The next generation of business management: social ERP," Nick Castellina, Aberdeen Group, April 2015

2 Operational Efficiency

Take advantage of more than 1,000 new capabilities



Improving the internal and external connectedness of your business is just one way in which Epicor ERP 10 boosts productivity for manufacturers. There are hundreds and hundreds of other developments, small and large, that all add up to a lot more speed and simplicity for users—and, ultimately, much more efficient operations for your business.

Operational efficiency with Epicor ERP 10

The product enhancements we make are rooted in continuing conversations with our customers—listening and responding to what you want to do to grow your business.

As a result, there are improvements for everyone, from complete feature overhauls down to seemingly minor tweaks that nevertheless make a big difference. Those in finance, sales, operations, and IT will all benefit in a multitude of ways—reducing errors and frustration, and saving a lot of time. If your growth plans include expansion to different countries, we've also transformed support for global operations, with much more flexibility in how and where you post transactions, calculate tax, handle currency, and store your data.

Manufacturers that have moved to Epicor ERP 10 have also found that they no longer need many of the customizations they had previously developed. Requiring fewer customizations translates directly to less IT effort and cost to keep your business processes running smoothly.

We were running two times, sometimes three times faster than we were on 9.05.

—Allen Richey | Cyclotron

Epicor ERP 10 will change the way we work—touch-enabled, touch-friendly,... [allowing] employees to adapt the solution to the way they want to work.

—Jos Greeve | Boers & Co FineMetalworking Group

Completely new modules

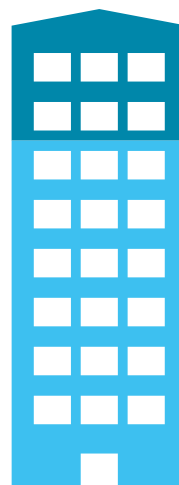
Once you've moved to the Epicor ERP 10 platform, you can also take advantage of new optional modules not available with earlier versions of the software. These include:

Epicor Commerce Connect (ECC)—helping you interact in more flexible ways with customers, partners, and suppliers through fully integrated web services and eCommerce (see page 8).

Epicor Data Analytics (EDA)—giving you pre-built, customizable analytics packs that allow for deeper analysis than Epicor Data Discovery does, as you can work with vast amounts of data from Epicor ERP and other sources. EDA delivers actionable insight into your most important financial and operational metrics, so you can make more informed decisions that help you innovate, transform, and grow. We've listened to what our manufacturing customers tell us they want from a starter business intelligence capability, and have built the templates to get you up and running quickly and easily.

Epicor Field Service Automation (FSA)—connecting your field staff with the information and processes they need to serve customers more efficiently in the field, and allowing you to automate workflows in the work order lifecycle from creation through billing. You can also extend the value of FSA by leveraging Internet of Things (IoT) technologies to give you a detailed view into the performance of equipment—enabling you, for example, to develop more proactive maintenance services.

DocStar Enterprise Content Management (ECM)—letting you integrate and automate document management processes across the full document lifecycle. Aberdeen Group has found that organizations that pair ERP with enterprise information management (EIM)³ achieve almost 2.5 times greater improvements in productivity than those that don't.⁴



76%

of high-growth businesses favor constant innovation over business stability and are inherently optimistic

Source: MORAR Growth Survey 2016

³ EIM includes content/document management

⁴ "Don't Be Left Behind: The Time for Digital Transformation is Now," Nick Castellina, Aberdeen Group, October 2015

Technology to take you further, faster


Keeping pace with the speed of technology change, we have also hugely simplified and standardized the underlying architecture of the Epicor ERP 10 platform. For your business, this means:

- ▶ Greater system reliability, performance, and scalability so that you can grow with confidence
- ▶ A solution that is easier to monitor, manage, and update, resulting in lower IT costs
- ▶ Easier integration and interoperability with other systems, so you can take advantage of smart manufacturing initiatives such as integrated IoT implementations that will give your business a competitive advantage



76–90%

faster server response time
for typical activities
(Epicor ERP 10 vs. Epicor ERP 9)



More intuitive, too

We've paid a lot of attention to the user interface of Epicor ERP 10, including the overall "look and feel," navigation, help features, personalization options, and the way social feeds and business intelligence are embedded.

The system is now touch-enabled, working seamlessly on touch-screen PCs.

From its interface to its functionality, Epicor ERP 10 is easier and more appealing to use, and likely to take hours out of the working day through its many improvements—resulting in happier employees and a more efficient business.

3 Cloud-Readiness

Choose a platform fit for the future



The new Epicor ERP 10 platform is cloud-native—designed specifically to take advantage of the flexibility of cloud computing, and to deliver on the promise of cloud-based innovation as a key enabler of digital transformation.

The cloud-readiness of the underlying Epicor ERP 10 platform is critical to the system's mobile, social, interoperable, and analytical capabilities. When manufacturers use these to embrace smarter ways of working and gain greater visibility and insight, they are leveraging cloud-based technologies for business transformation.

Cloud-readiness in Epicor ERP 10 gives you choices

When upgrading to Epicor ERP 10, many of our manufacturing customers have chosen Epicor Cloud ERP, which offers a software as a service (SaaS) model that is fully managed by our IT professionals.

They find this more cost-effective—and also more secure. As small to midsize manufacturing businesses, they often can't invest in dedicated, specialist information security expertise in the way that Epicor can and does.

For those who prefer to host the system on their own premises or through a different IT partner, we can accommodate either option. You will still be getting the same cloud-native system, with all of its capabilities.

Whatever your deployment choice, Epicor ERP 10 will be a flexible business foundation for your company's digital transformation or Industry 4.0 ambitions.

We grow through the flexibility to change what we do, while our competition stay with the old ways. Epicor enables that flexibility.

—Daryl Hewison | Fixfast

4 Business Assurance

Enjoy peace of mind and confidence



When you move to Epicor ERP 10, you avoid the many pitfalls of staying on outdated software for too long, and instead enjoy the benefits of being able to stay current with future upgrades.

Business assurance with Epicor ERP 10

The risks of outdated systems include failure to comply with regulatory requirements and a lack of IT support, bug fixes, and security patches. Your business will be vulnerable to downtime and breaches—very bad news for you and your customers.

Because Epicor ERP 10 is designed for the SaaS model, it comes with the assurance of staying current with updates and upgrades.⁵ We've also designed a new release methodology that gives you all of the benefits of staying current, without springing changes on you that you're not ready for.

The move gives you peace of mind that your business will stay compliant, supported, and secure. You'll keep pace with changes in financial controls, tax laws, reporting requirements, and international trade requirements. You'll be there for customers with greater uptime and security, and you'll always have access to the latest features and functionality, to keep your business evolving and planning for the future—with confidence.

We can better plan our business activities.

—Carl Heeder | StatLab

⁵This applies to Epicor-hosted deployments. If you or a third party hosts Epicor ERP 10, then it is your or their responsibility to apply updates and upgrades provided by Epicor.

Next Steps

Take a look back at the Aberdeen Group figures on page 3. Legacy ERP systems have worked well for businesses using them, but those that move to the latest ERP version do even better.

It costs to do nothing

The cost of doing nothing includes less-efficient operations and less-satisfied customers, and therefore a greater chance of losing out to competitors that move forward with the latest ERP system.

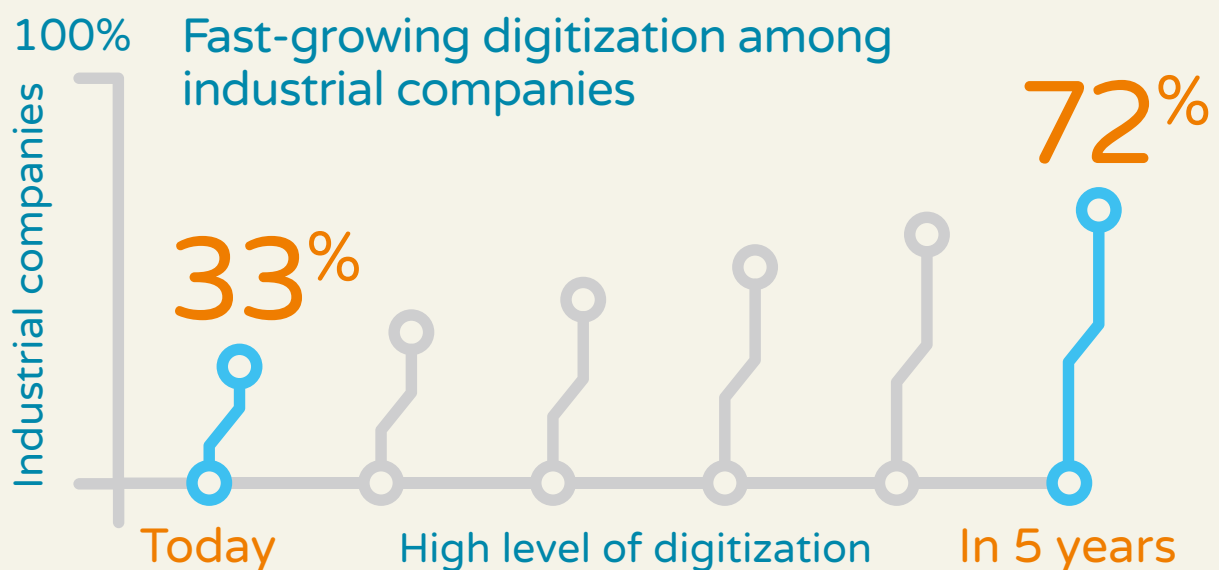
It pays to act now

When you upgrade, on the other hand, you don't just get better at what you already do well. You discover smarter ways of working that support more dramatic transformation. Right now, the most ambitious manufacturers are looking for new levels of competitiveness through advanced robotics, additive manufacturing (3D printing), machine-to-machine communication and process automation IoT, greater mobility for their people, and the harnessing of data for business intelligence.

If you want to join these Grow Getters, the time to start is now. Almost three-quarters of respondents to a PwC global industry survey expect to have a high level of digitization in five years, compared with only a third who are highly digitized today. There's no time to waste.

You need the most recent technology to stay ahead of competitors.

—Jos Greeve
Boers & Co FineMetalworking Group



Source: "Industry 4.0: Building the digital enterprise," PwC, 2016

Your Keys to the Future

To succeed with transformation, you need your ERP system to support it—which is what Epicor ERP 10 is all about. It can be the hub for your eCommerce activities and your IoT initiatives. Cloud-native, mobile-enabled,

interoperable, flexible, and secure, it gives you the keys to push the limits of transformation and growth—and we've worked hard to make the move easy for you.



About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit www.epicor.com.

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