

Getting Started with Epicor Kinetic

User Guide

Epicor Kinetic: A Journey into Great User Experience

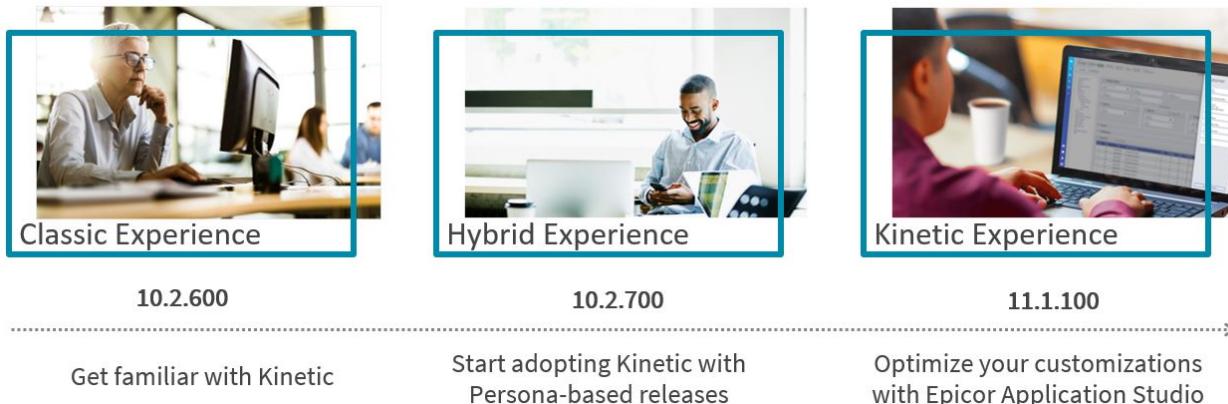


Technology is ever evolving and so is our software. We are continuously innovating to deliver the solutions that your business needs to stay competitive now and in the future. Kinetic is the transformation journey to provide a modern user experience that is aligned with the standards you expect when using your favorite consumer-grade applications.

The Kinetic User Interface is modern and intuitive. Kinetic simplifies your everyday tasks by showing the most relevant data, so you can make decisions faster. Through Epicor Application Studio, it provides and the ability to tailor the applications in a cloud friendly, upgrade resilient way that requires low/no code.

Ensuring a Successful Transition

We understand that change doesn't happen overnight. Start your Kinetic transformation today, at your pace, and see immediate value from the many forms already available. Minimize business disruption with a phased approach to adopt the Kinetic UI and optimize your customizations with Epicor Application Studio.



We continue making progress on the Kinetic transformation journey at a fast pace. With 10.2.600 you had the opportunity to start using and getting familiar with Kinetic through the different Reports and Processes, Dashboards and Trackers that we continuously released.

Now, with **10.2.700** you can take the next step as we're rolling out **Kinetic Applications by Personas**, focusing on **AR, AP, and primary Quote to Cash transactions and entry forms**. This approach will make it easier to onboard targeted user groups, providing the necessary flexibility to opt in and out of the Kinetic UI as you need. This ensures a smooth adoption and continuity in business operations. This release also brings new features and enhancements to **Epicor Application Studio** so you can tailor Kinetic Applications with a best practice approach that is cloud friendly, upgrade resilient and requires low/no code.

We will guide you through every step of the journey, enabling a smooth transition and user adoption. Take advantage of the resources that are available for you:

- ▶ **EpicWeb Kinetic Resources Site:** One-stop-shop for all assets related to Kinetic and how to get started with your journey. You can find it [here](#).
- ▶ **Embedded training and education tools:** Allow you to easily learn the Kinetic UI leveraging real-time situational scenarios, videos, and articles. Instead of making learning a separate process, these tutorials ensure that the user can keep working, while getting answers to the most pertinent questions in real time.
- ▶ **Kinetic Application Maintenance:** Use this application to control the rollout of Kinetic forms across your organization by company, functional area, menu and form level.
- ▶ **In-App Feedback:** Your feedback helps us to continuously improve our solutions and deliver the innovation you need. Now it's even easier to provide it right from the application using the in-app feedback button.
- ▶ **Kinetic Preview Program:** We incrementally release Kinetic forms in preview mode so you can get familiar with the Kinetic UI gradually. We also gather feedback that help us drive the smart innovation you need.

Contact your Customer Account Manager to take advantage of this opportunity to gain early access to new Kinetic applications.

Start Your Kinetic Journey

Over 50% of our customers have all their employees using the Kinetic applications available. Don't get behind!

To make it possible to promote Kinetic adoption among your workforce in a phased approach, Epicor will continue to support both the new Kinetic forms and the Classic (existing) forms throughout the rollout of Kinetic and beyond for a period of time in alignment with our product lifecycle policy. Our plan is at Epicor ERP 11, the next release of Epicor ERP, to stop enhancing the Classic forms once the Kinetic UI has reached maturity. Therefore, getting started early gives your team a greater window to transition to the new experience, reducing the disruption for your business.

Regarding your existing customizations, they aren't going away soon. They will be supported in Classic through the transition. If you have a customization attached to a form that has been converted to Kinetic, by default the application opens it in the classic UI.

Here are some guidelines that will help you get started:

Phase 1: Getting Familiar with Kinetic UI

The first phase of this process is to get familiar with the Kinetic user interface. This guide will show you how to easily start testing and providing feedback on Kinetic Applications.

- ▶ Enable the Kinetic Home Page in your system. You must be running on ERP 10.2.500 or later.
- ▶ From the Kinetic Home Page, use the Help and Support panel to search for the keyword Kinetic to see all materials available to help you get familiar with the Kinetic UI. We recommend you read the following articles as a start:
 - Exploring Kinetic Application Features
 - Switching between Classic and Kinetic
 - Managing Kinetic UI Roll Out
 - Understanding Kinetic Home Page
 - Managing Access to Kinetic Applications
 - What's New in Kinetic
- ▶ Check out the most recent [ERP Release Notes](#) for a list of the Kinetic Applications available with each release.
- ▶ Choose the Kinetic applications that you want to test. Look at the Tours and Guided Learning available to learn as you go.
- ▶ As you are testing Kinetic applications and you have feedback, you can easily share it from within the application with the new Feedback button.
- ▶ Don't forget to start learning about **Epicor Application Studio**. You can easily access it within any Kinetic Application from the overflow menu (Customization). With Application Studio you can tailor Kinetic applications without the complexity of changing code. You can create layers, add/change components, rules, and events through a visual designer with drag and drop functionality and the ability to preview and validate changes before making them. You will find embedded education tools within Application Studio so you can learn as you go.

- We recommend getting back to your team and discussing how you can start adopting and deploying Kinetic forms within your organization. This is a great opportunity to think how you can streamline existing processes taking advantage of the Kinetic UI before you deploy to a large group of users. You can also join the **Kinetic Preview Program** to help us drive innovation. Contact your Customer Account Manager for details on how to participate.

Phase 2: Deploy to Your Team by Persona

Now that you have tested Kinetic Applications, discussed it within your teams and provided valuable feedback to us, it is time to take the next step and implement a Persona based workflow.

- With 10.2.700 you'll have access to **AR, AP, and some Quote to Cash transaction and entry forms**. Choose the Persona(s) and forms you want to adopt and make a plan to roll it out to the targeted groups within your organization.
- Become familiar with the new features of Epicor Application Studio coming with 10.2.700. Which include:
 - Application Studio Homepage so you can visualize your Kinetic Application configuration projects
 - Ability to embed Data Discovery BI views and external websites
 - Reusable Component Design
- Remember you can provide your feedback very easily from within the Kinetic Applications using the in-app feedback button

The Journey Continues

As we continue making progress on the Kinetic transformation, we'll be expanding this guide with recommendations on how to move to the next phase.

For additional information about how to get started with Epicor Kinetic please visit the [Kinetic Resources Site](#) on EpicWeb, where you can find all Kinetic related materials in one place.

About Encompass

Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers and Distributors. Serving small and medium-sized businesses since 2001, Encompass has helped modernize operations and automate processes for hundreds of customers across the globe. Whether undertaking full-scale implementation, integration, and renovation of existing systems, Encompass provides a specialized approach to every client's needs. By identifying customer requirements and addressing them with the right solutions, we ensure our clients are equipped to match the pace of Industry.



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