

# Epicor Collaborate

Discover how intelligent business systems can help improve your processes, evolve your business, and help you achieve growth initiatives.

## Connect Your Organization Like Never Before

Meaningful relationships exist across your company and are a great resource for serving customers and improving efficiency. When workers engage with each other to solve problems and innovate processes, your business benefits and strengthens. By integrating unstructured meetings and conversations with your critical business ERP data and by enabling worker conversations digitally, you can help eliminate worker silos—giving your business a competitive advantage.

Epicor Collaborate is an enterprise-wide collaboration and productivity tool built on a cloud platform. Easy to use and intuitive with hashtags and mentions, Collaborate connects groups of workers simply. When your employee teams communicate digitally, you increase customer responsiveness and satisfaction.

## Actionable for Greater Productivity

Easily accessible across the Kinetic application, Collaborate, shifts workers from monitoring analytical dashboards and reports to being actively engaged with instant notifications from ERP processes and events. Collaborate message streams collect and communicate these messages across the enterprise. Out-lier processes that often bury users in meetings or email are easily mainstreamed with the flexibility and simplicity of Collaborate—optimizing productivity. Key integrations driving worker productivity include Microsoft Teams®, Epicor IoT, Epicor Virtual Agent (EVA), and Epicor Data Discovery.

- Microsoft Teams Integration enables teams with external players to connect on project details by sharing Epicor Collaborate messages.
- Being notified of adverse events in ERP or directly from your equipment through Epicor IoT, can drive new levels of responsiveness and productivity.
- Not every solution that improves productivity has to be complicated. Epicor Virtual Agent (EVA) delivers on simplicity through natural language to answer questions of Kinetic.
- Businesses that share and coalesce around business metrics are data-driven organizations that thrive on solving problems. Collaborate offers users the ability to shared Epicor Data Discovery (EDD) metrics.



Kinetic

### Benefits

Modernize employee communication for more engaged workers

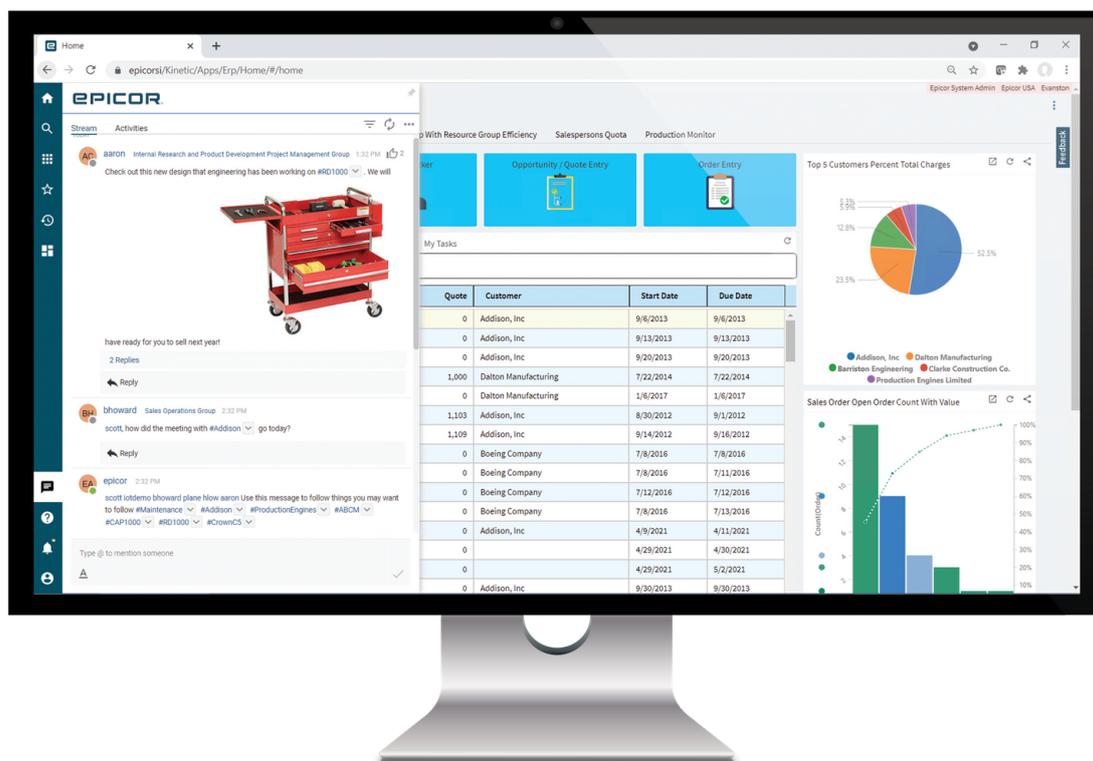
Boost team productivity and responsiveness

Experience new levels of worker efficiency

Share and action metrics as exceptions occur

Eliminate worker silos to improve customer responsiveness

Reduce time wasted with email and status update meetings



## Easy to deploy

Both Kinetic in the cloud and Kinetic on premises are easy to integrate with Collaborate. There are three simple steps to get started.

## Simple to learn—designed for business

Collaborate contains many of the same interface conventions your employees use at home on their devices. This makes Collaborate simple to use and quick to learn. Since employees can adopt the features with near immediacy, Collaborate can offer a fast return on investment. Available to work with Kinetic in the cloud or on premises, Collaborate helps all users stay in touch.

Employees log into the Kinetic Home Page and select the Collaborate tab. They can then start messaging, subscribing to ERP events, and sharing knowledge. Collaborate functions are like other leading cloud-native digital messaging tools, but the feature is designed for heightened connectivity for Kinetic and your business.

## The promise of cloud

Built on the Microsoft® Azure® platform, Collaborate is a cloud solution that leverages powerful Azure tools to deliver security and scalability for your messaging needs. More importantly, the cloud platform provides access to Collaborate on a desktop or a compatible tablet through the Epicor Home Page. Collaborate makes work happen—

providing timely messages anywhere for rapid decision making.

## Enterprise-wide Collaboration

Multisite, multi-company organizations need to communicate across boundaries to solve problems and remain responsive to customers. As a cloud-based solution, Epicor Collaborate delivers messaging capabilities for intercompany and inter-site conversations. Featured in this capability is the ability to create Enterprise groups that can span locations for greater business efficiency.

## Share knowledge

Sharing knowledge helps businesses more easily onboard new employees and retain critical knowledge to support future operational efficiency. Making it easier for staff and departments to share information means that skills and knowledge can be pooled— leading to thorough problem solving, better project progression, and new ideas. Collaborate provides a robust repository of contextual and searchable messages to help workers find answers to repeatable customer issues, store and retrieve process knowledge, and maintain historical audits.

## Operational visibility

Subscribing to exceptions in ERP data helps business leaders respond to problems as they happen.



For example, a stakeholder may subscribe to a customer or credit hold status. Once a credit hold message appears in their Collaborate message thread, stakeholders can message finance immediately to determine the reason and follow up with the customer.

### Group Messaging

Employees exceedingly work in groups to drive innovation and meet customer expectations. In particular, being able to support cross-functional teams that can coalesce around a complex estimate, project, customer issue, production event whether single instance or ongoing and more. Introducing this group functionality (both public and private) is important as members are informed on a timely basis and can offer their perspective.

### Microsoft Teams Integration

Microsoft Teams is an industry-leading collaboration platform that combines persistent workplace chat, video meetings, file storage, and application integration for businesses. It is widely used and sits alongside Microsoft Office 365® productivity tools. Collaborate Groups connected to Microsoft Teams to share communications across users, including external guests outside of Kinetic. Note: This feature requires Microsoft Office 365 level AD.

### Custom Notifications (Change Data Capture (CDC) and BPM)

Greater responsiveness in business workflow can be more easily achieved with instant notifications guiding your processes. To offer more opportunities to build these notifications into your processes, Collaborate lets users create custom notification rules. This is achieved with the Change Data Capture (CDC) management solution.

Additionally, users can design a Business Process Management (BPM) workflow to post custom notifications in a Collaborate message stream through a new Notify Collaborate action. Users can leverage Data Directives, Method Directives, and Epicor Functions to create workflows that include the Notify Collaborate actions and the action that triggers it.

### Operational Efficiency from IoT Notifications

Boosting operational oversight to deliver great performance with Epicor IoT is easier in the latest release as users can view IoT notifications within Collaborate message streams. Users can configure IoT based notifications via BPM and feeding them into Collaborate. This allows users to be notified on asset performance while collaborating with a group of stakeholders on failure situations.



***"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*

### **Instant Answers with Epicor Virtual Agent (EVA)**

EVA helps users automate mundane tasks such as looking up a contact or inventory information—all she needs is a simple text command. Integration with Collaborate supports EVA skills or commands within message streams. Ask EVA to show you a customer, and then the customer credit, and she will return richly formatted information. The experience and the skills supported are consistent with what is offered in the EVA mobile app.

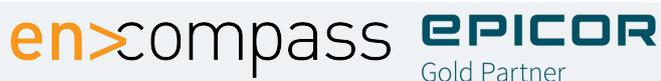
### **File Sharing Support**

Collaborate users can share files easily, selecting their preferred choice of cloud file storage system. Attaching files in the feeds and conversations speeds up teamwork in any company, and the attachment is saved in the file storage system.

Collaborate integrates with multiple cloud storage providers such as Google Drive® or Dropbox®. Epicor ECM (Enterprise Content Management) is also an option for Collaborate file storage, no matter whether Epicor ECM is Cloud or On-Premises.

### **Actionable EDD Metrics Drive Improved Productivity**

More easily describe business challenges with EDD metrics in Collaborate. Users can leverage an EDD widget to snag and share EDD metrics, including comments that drive actions. New levels of productivity can result when metrics are shared and actioned as exceptions occur. Any key metric can be shared from sales, finance, or operations.



Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers. 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.

Contact Us Today: [info@encompass-inc.com](mailto:info@encompass-inc.com) | [www.encompass-inc.com](http://www.encompass-inc.com)

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations, or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. The results represented in this testimonial may be unique to the particular customer as each user's experience will vary. This document and its contents, including the viewpoints, testimonials, dates, and functional content expressed herein are believed to be accurate as of its date of publication, June, 2021. Use of Epicor products and services are subject to a master customer or similar agreement. Usage of the solution(s) described in this document with other Epicor software or third-party products may require the purchase of licenses for such other products. Epicor and the Epicor logo are trademarks or registered trademarks of Epicor Software Corporation in the United States, and in certain other countries and/or the EU. Microsoft Azure, Microsoft Teams and Microsoft Office 365, Google Drive and Dropbox are trademarks of Microsoft Corporation, Google Inc and Dropbox Inc. Copyright © 2021 Epicor Software Corporation. All rights reserved.