

Upgrading to Kinetic



What's Kinetic?

Kinetic, the new name of Epicor® ERP, is the cloud ERP solution built with manufacturers, for manufacturers. Accelerate your growth and gain momentum to maximize profitability and position your business for the future of manufacturing.

Capture the true value of cloud ERP with Kinetic. An intuitive, configurable, and guided user experience with embedded learning helps you maximize your profitability with real-time business intelligence and built-in collaboration tools. Kinetic has the functionality you need to run a modern, future-ready business poised to capitalize on data, transform digitally, and innovate without limits.

Upgrading to the latest release of Kinetic is easy

This table provides a quick overview of how your licensing is impacted when you upgrade to Kinetic.

- If you are currently running on a previous version of Epicor ERP listed below on-premises, and you upgrade to Kinetic on-premises, there will be no license change as it's just considered an upgrade within the same deployment
- If you choose to move to the cloud from and on-premises, there will be a license change to transition to the SaaS deployment

Current Solution	Upgrading to Kinetic Cloud	Upgrading to Kinetic On-Premises
Vantage/Vista	License change to SaaS	No license change, just an upgrade
ERP 9	License change to SaaS	No license change, just an upgrade
ERP 10	License change to SaaS	No license change, just an upgrade

Upgrade Services Program

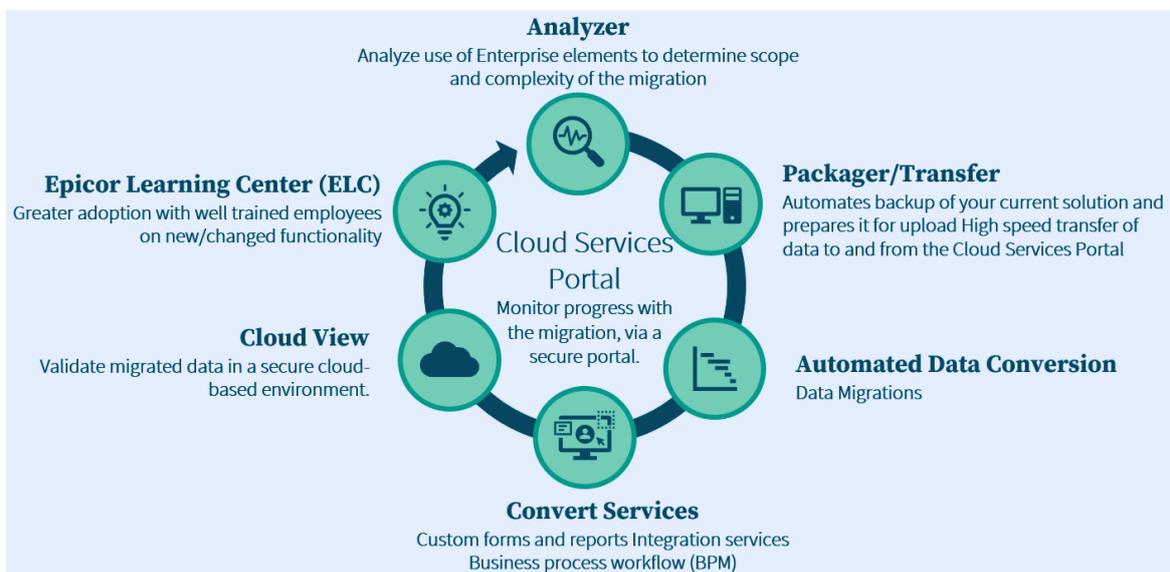
You can do your upgrade to the latest Kinetic release on-premises or cloud with the help of the Professional Services Team through the Upgrade Services Program. We offer the services and tooling to help contribute to your successful upgrade.

The Epicor Signature Methodology is leveraged in every Epicor Professional Services engagement to implement and upgrade your ERP software. Decades of successful software implementations and upgrades have refined the program, resulting in minimized risk, cost, and business disruption. The process of upgrading has driven the need for a specific upgrade methodology to move to the latest Kinetic release. The upgrade program incorporates the elements needed from the upgrade Signature Methodology with the additional assistance your business may need—including technical consulting, customization services, reporting services, configurator services, EDI services, and onsite business consulting.

Cloud Upgrade Services

Moving to the cloud has never been easier. We have invested in secure, cloud enabled tooling and services that provide a system analysis before the upgrade, as well as an environment for packing and delivering business-specific upgrade elements such as data conversion and customizations.

Epicor offers rapid data conversion services that include data cleansing and post upgrade reconciliation analysis. To reduce the upgrade timeline, we deploy Cloud View where users can use a secure cloud environment to learn and test their release and self-upgrade customizations and reports. To assist with more complex customizations, we also offer à la carte conversion services. Finally, as employee adoption is critical to the success of the release, Epicor Learning offers education via the cloud-based Epicor Learning Center (ELC).



Adopting the New User Experience

The new browser-based user experience is one of the biggest benefits you get when upgrading to Kinetic. You can adopt the new UX at your own pace to minimize business disruption with our phased approach. We recommend you start getting familiar by using the Kinetic Home Page. It's the easiest way to introduce the new user experience and get access to great onboarding features like the Help and Support Panel where you can access contextual and guided training. For more information, please refer to the [Getting Started with the Kinetic User Experience Guide](#), which is located on the [EpicWeb Kinetic UX Resources Site](#), the one-stop-shop for everything related to new user experience adoption.

After you upgrade, to assist with the change management process, you can continue using the classic user interface (UI) but there are important lifecycle details you need to consider:

- With Kinetic 2021.1, we will no longer continue enhancing the classic UI. Critical and compliance updates will be available for 2 years, but new functionality will only be added to the new browser-based Kinetic UI going forward.
- After 2 years, the classic UI and the classic and modern shells will be available in the software but not updated
- After 3 years from the release of Kinetic 2021.1, the classic UI, and classic and modern shells will be removed from the Kinetic application.

What happens to my existing customizations?

Your existing classic customizations are not going away when you upgrade to Kinetic 2021.1. They will continue to work in the Classic user interface alongside the Kinetic UX forms you have enabled, so you can adopt the new user experience at your own pace without business disruption. 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.

From Customization to Low/No Code Configuration

We have a program in place to uplift your existing classic customizations to the new user experience. We'll guide you during the transition with resources and programs to facilitate the upgrade and end-user adoption process. You can run it during the upgrade to Kinetic or any time after. The Professional Services team can help you get started. For more information regarding the new Kinetic user experience, you can access the EpicWeb Kinetic UX Resources site which contains helpful resources and it's constantly updated.

Stay Current!

To get started with your upgrade process contact your Customer Account Manager.

EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com

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