

Product

- ▶ Epicor® ERP

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

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 eliminate worker silos—giving your business a competitive advantage.

Epicor Collaborate is a modern 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 Epicor ERP 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 Epicor ERP.
- ▶ 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.



Easy to deploy

Both Epicor ERP in the cloud and Epicor ERP 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.

Employees log into the Epicor ERP 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 Epicor ERP 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.

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 Epicor ERP. Note: This feature requires Microsoft Office 365 level AD and as of the publication of this guide, this feature is in preview mode. A message will appear upon entry of the solution and will disappear once the solution becomes generally available (GA).

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.

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.

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.

"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

*Worldwide Team Collaborative Applications Forecast, 2019–2023: Collaboration Growth Impacts the Future of Work

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