Sales Enablement Training - BisTrack Global 6.5

There are exciting developments happening in the BisTrack world!

Epicor BisTrack Global 6.5 is scheduled for general availability on November 30, 2020.

As the name suggests, BisTrack Global is for the building supply industry around the globe.

It is our privilege to provide solutions that help the building supply industry gain insight, simplify, and optimize their processes, so they can better serve their customers and grow their business.

BisTrack Global 6.5 delivers new enhancements and features to support the building supply industry, and expands Epicor's commitment to provide a complete, end-to-end solution.

We are bringing together the best of the BisTrack solutions in North America and the UK into a single product: BisTrack Global.

We're expanding innovations in dispatch and delivery, user experience, mobility, process optimization and more, to make the BisTrack platform even more robust.

We are continuing with our commitment to add customer-driven and industry-focused functionality.

These initiatives make BisTrack even more innovative and valuable for our customers, more competitive in a sales deal, more cost-effective to develop and maintain, and more profitable for Epicor and for you.

These changes are part of a multi-phase rollout to customers and prospects.

In this course, we'll explore messaging, product details, and marketing resources including communications and sales enablement tools.

For more information, select the corresponding buttons.

Topics

- Customer Communications
- Product Overview
- Marketing Communications

Customer Communications

We at Epicor are committed to your client's success.

Regardless of what the economy, supply chain, or their customers may throw at them, we want our customers to know that Epicor is their partner to help them navigate, grow, and thrive.

We've designed Epicor BisTrack Global to help your customers gain insight, simplify, and optimize their processes, so they can better serve their customers and grow their business.

BisTrack Global 6.5 is the latest release of business management software for building materials supply businesses from the industry leader, Epicor Software.

Along with the enhancements provided in BisTrack Global 6.5, it's important to let your customers know that for more than 45 years, Epicor has been part of the fabric of the industry, working with building supply businesses of all sizes, developing unparalleled expertise, and providing leadership in technology innovation and management best practices.

We encourage you to emphasize that Epicor provides complete, secure, user-friendly business solutions to building materials suppliers and metal service centers globally.

As we mentioned in the introduction, BisTrack Global 6.5 presents many exciting new enhancements and functionality.

One of the more comprehensive changes is BisTrack Global's integration with Epicor Financials, which provides all BisTrack users, regardless of size, a business management solution with end-to-end control and visibility of financial transactions and related processes.

It's an appealing platform that will help your customers improve productivity and profitability.

Together, we're raising the bar on building supply business practices.

Epicor delivers on this value, and building suppliers reap the benefits of a modern platform:

Protecting their investment by adopting a secure, reliable platform with longevity, maintaining continued advancement through ease of enhancements, upgrades, and 3rd party interfaces, and enhancing employee productivity and satisfaction through an intuitive user interface that fosters engagement and improved customer service.

We are ensuring higher productivity and responsiveness through our web, remote, and mobile capabilities, and we are facilitating better decision-making and insights for growth and profitability opportunities through fully integrated financial, sales and operational data access, real-time display of KPIs, and analysis capabilities.

Product Overview

Your customers will undoubtedly have questions that you'll want to be thoroughly prepared to answer.

In this section we'll highlight the value of some of the BisTrack Global 6.5 enhancements.

First some background.

To better leverage Epicor product resources and R&D investments, we decided to reunite the regional versions of BisTrack in the North American and UK markets.

To achieve this, we conducted a thorough gap analysis, as well as a review of customer bases and prospects in each region to develop our phased BisTrack Global rollout plan.

In North America, BisTrack Global will be available out-of-the-gate to prospects and existing BisTrack customers.

For North American customers, it will look like any other upgrade.

In the UK, we're initially making BisTrack Global available only to prospects, or existing customers who would like to go through a full implementation.

We have incorporated this UK functionality upon initial release:

Specific EDI providers

Geotab GPS integration

Specific pricing options (best price, by sale type)

BI (Business Intelligence) improvements, including additional Smart Objects and User Defined Fields.

These will be new features for our North American BisTrack customers and prospects.

In the UK, existing customers can begin to upgrade to BisTrack Global by the end of 2021.

Let's examine Epicor Financials' impact on BisTrack Global.

We will focus Epicor Financials on new sales, providing businesses with tight integration of operational and financial data.

Existing customers are welcome to continue using QuickBooks and Dynamics GP and we'll continue to support those solutions.

Epicor Financials is a comprehensive accounting and financial management package, including General Ledger, vendor management, accounts payable, cost accounting, and asset management functionality.

However, BisTrack users will continue to use the invoicing, accounts receivable and rebate functionality within BisTrack.

Epicor Financials' multicompany, multibook, and multicurrency capability supports BisTrack users with operations, customers, or suppliers in multiple countries, as well as business units or corporate entities with separate P&L responsibility.

Epicor Financials has many optional modules and add-on products, including: Payroll, XL Connect, Epicor Data Analytics, and Epicor Financial Planner.

From Epicor's point of view, the Epicor Financials integration improves our competitive position, debunking the claims of our competitors, in particular DMSi Agility and ECi Spruce who have said our BisTrack solution is inferior because it doesn't have native financials.

Further, Epicor retains more of the revenue from the sale of Epicor Financials compared to Microsoft Dynamics GP.

We are introducing two more modules in the BisTrack Kinetic user experience with BisTrack Global 6.5, Sales Order Processing and BisTrack Kinetic Analytics.

They join Kinetic functionality already available: Kit Configurator, CRM, Sales Management, and Journey Planner.

These platform changes will deliver an outstanding user experience and increase the customer's web and mobile-enabled functionality.

Let's examine BisTrack Kinetic Analytics a little closer.

It's important to note that Kinetic Analytics will only be released as a beta product to selected customers within BisTrack Global 6.5.

We need further client feedback and some more analytics before we allow full commercial availability to all clients.

BisTrack Kinetic Analytics is a powerful analytics and visualization tool that you must see to appreciate.

Epicor selected the best-in-class DOMO Analytics and then embedded the product in BisTrack Global to offer unparalleled visualization options, flexibility, and display customization.

This cloud-based solution allows customers to access reporting and analytics anytime, anywhere.

Watch for an upcoming release date for the BisTrack Kinetic Analytics.

In this beta phase, BisTrack Kinetic Analytics provides the analysis the customer's salespeople need in the field including sales history and product categories, helping them to close deals and serve their customers better.

As with all releases, Epicor BisTrack Global 6.5 contains many enhancements. Here's a quick look at the value these new features will deliver:

With Simplified Kit Management, you can now use attributes to perform bulk set up or changes that affect all kits at the same time.

For customers with extensive kitting updates, such as window and door suppliers, the new Kit Management enhancement can save significant time and effort.

Deferred Stock Allocation allows you to input future orders and defer inventory purchases and stock allocation into the future when it is actually needed.

There are two new components with Pricing Management.

The new Best Pricing selection calculates a customer's best price from applicable pricing rules, providing your customers with the pricing rule that's best for them.

The new Pricing by Sale Type allows you to display different prices for different types of sales.

For example, delivered versus pick up. This avoids having to add delivery charges or other fees.

With the new Journey Aware functionality, drivers become even more efficient.

This new functionality enables them to see their entire journey, including the full list of stops, transactions at each of the stops, and it provides mapping capabilities to their next stop.

Supervisors can view the entire route, tracking when drivers arrived, stopped, and left, as well as viewing order status updates when images and signatures are taken by the driver.

In BisTrack, Google address verification adds an even greater level of accuracy by providing latitude and longitude coordinates to ensure drivers can get to the right locations as quickly as possible.

In Web Store API, businesses can use a new endpoint in the Web Store API to add or update customers and customer contacts.

Warehouse Management has been enhanced with full BisTrack pack support, and more.

For more details, refer to the BisTrack Global 6.5 enhancement flyer.

Marketing Communications

Customer Communications will announce the general availability for Epicor BisTrack Global Release 6.5.

We are excited to host and are promoting a BisTrack Global Webinar week for our North American customers.

Select the buttons for which you want to register.

- Nov. 30 - What's New in BisTrack

- Dec. 1 - What's New in BisTrack: Dynamics Kits

- Dec. 2 - What's New in BisTrack: Kinetic

- Dec. 3 - What's New in BisTrack: Epicor Financials for BisTrack

- Dec. 4 - What's New in BisTrack: Mobile and Web Track

- View the Full Series

Here's a list of sales enablement documents we're making available in the MRC and Spark.

BisTrack Global 6.5 Release Enhancement flyer

BisTrack Global brochure

What's New BisTrack Global Session (Recording from Ignite)

Epicor Financials Fact Sheet (for BisTrack and LumberTrack)

Epicor Financials On-Demand Webinars

- Financial add-ons:

  o XL Connect

  o Epicor Data Analytics

  o Epicor Financial Planner

Epicor Financials and Dynamics GP comparison

Updated BisTrack Delivery & Journey Planner fact sheet

In addition, several of these supporting documents will be available to customers on the new BisTrack Global customer portal on EpicWeb.

If you have any questions on the BisTrack Global 6.5, please contact Alyson Wilcoxen or Jason Parchomchuk.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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