

Hytrol's Digital Transformation Roadmap

From Quote to Cash, Smarter and Faster



Our Agenda for Today

Digital Transformation – Speakers

Cheri Esposito
Chief Information Officer



Mitch Smith
Chief Revenue Officer



01

Vision & Goals

WHERE WE'RE HEADED TOGETHER

Future-focused growth powered
by business and digital transformation



VISION and GOALS: 2025 & Beyond

Establish a future-oriented vision and strategic goals to ensure IT platforms and business capabilities support Hytrol's growth, while reducing development costs, enhancing operational efficiencies, and accelerating GO-TO-MARKET speed.

Objectives



Process and
Optimizations



IP Solutions and
Digital Services



Technology
Simplification



Operational
Excellence



Growth (People
and Revenue)

To drive Digital Transformation, Hytrol's strategy is driven by the following 3 prong approach:

← Remediation

PROCESS, PEOPLE & TECHNOLOGY

Transformation →

1

REMEDIATION POSSIBILITIES

- myHytrol
- TOM/ASP
- HyCad
- Cool Orange
- NextGen HEROES
- IFS/Oracle DB
- AS400
- Executive Summary
- Datawarehouse
- HEROES Connect

2

SYSTEMS CAPABILITIES

- Sales Order Entry
- Engineering Source Control
- Customer Experience
- Engineering Design (AutoCAD)
- Enterprise Resource Planning
- Reporting
- Warehousing
- System Integrations

3

ENABLERS FOR BUSINESS

- Configure, Price, Quote (CPQ)
- Engineering Design
- Vault – Engineering Source Control
- Customer Relationship Management
- Digital Experience
- Artificial Intelligence (AI)



02

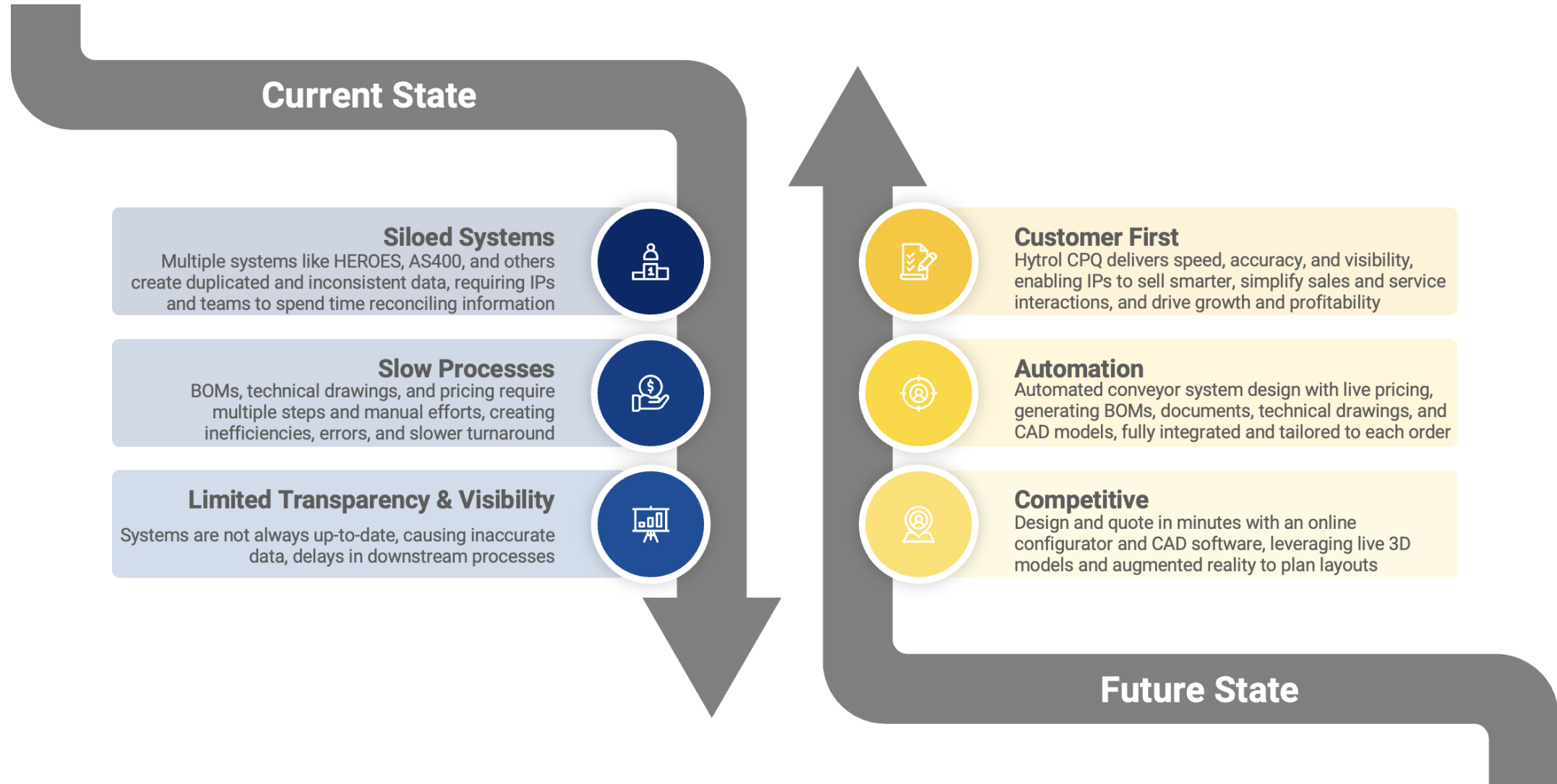
The Journey

FROM LEGACY TO FUTURE

Smarter tools, stronger
partnerships



The Journey: Modern Design and Quoting Experience



Why the Change

Sales Order Entry / Mgmt	
Today	Tomorrow
HEROES	CPQ
ASP / TOM	Vault
HyCad	Epicor
Exec. Summary	
BOM Processor	
IFS/Oracle DB	
AS400	
H. Connect	
D. Warehouse	
myHytrol	

Our legacy HEROES tool served us well for many years, but it no longer provides the speed or integrations needed today.

Through this digital transformation, **Hytrol is delivering a modern quoting experience**—faster, more intuitive, streamlined, and fully integrated.

The Ultimate Goal:

A smarter, streamlined interactive experience for our IPs — and greater internal efficiency for Hytrol.

Feedback from IPs

- Fast, lightweight performance
 - Simple User Interface
 - Q&A section
 - 3D environments
 - Constraint based rules
 - Connected to ERP and capacity
 - Cloud based
 - Accurate Bill of Materials
 - Spare Parts Lists
 - Freight Quotes
 - Reports
- And much more.....



Hytrol's Digital Transformation

**Smarter tools,
Stronger partnerships**

Hytrol's next-generation ERP system is integrated with a powerful Configure, Price, Quote (CPQ) solution

- Modern, end-to-end “quote-to-cash” process
- Enables intelligent guided selling, even for complex configurations
- Improves speed and accuracy in quoting and order entry
- Enhances execution with real-time data and seamless integrations
- Scales with capacity needs and supports future growth



03

Quote to Cash Experience

THE CONNECTED EXPERIENCE

From configure to delivery,
seamless and accurate



ERP Power = Smarter, Faster, Better

Better Forecasting = Fewer Delays

- Real-time integration between CPQ, ERP, and manufacturing translates quotes directly into production schedules, reducing lead time uncertainty and bottlenecks.

Accurate Parts & Materials Planning

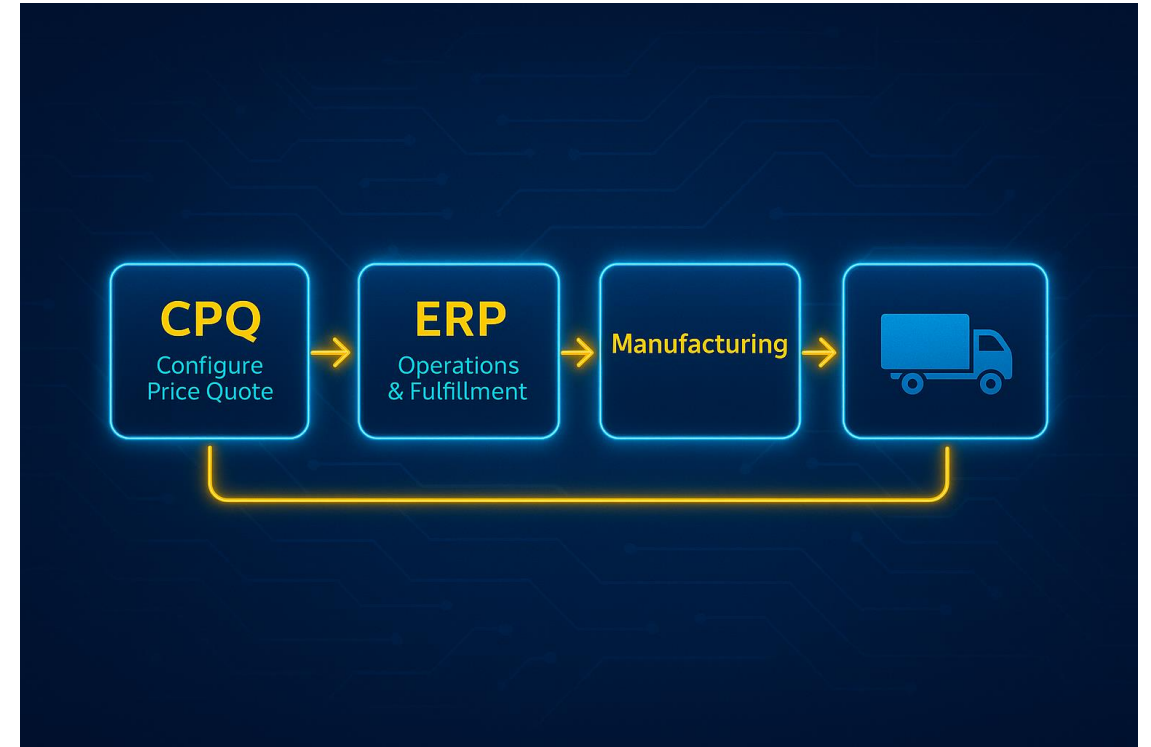
- Quotes automatically trigger material and component requirements, ensuring the right parts are secured earlier and avoiding supply chain shortages.

Clear Visibility for You and Your Customers

- Live delivery dates and inventory availability at the quoting stage allow you to set realistic expectations and build customer trust.

Sales Forecasting

- Ability to distinguish between simple quotes and high-probability opportunities
- Lead times dynamically adjusted based on available capacity and changes



Revamped MyHytrol: Your CSS Gateway

Everything you need, all in one place

Access

- Available to all Integration Partners
- MyHytrol as the central point for customer service, quotes, orders, and returns

Visibility

- Personalized dashboards
- Live order tracking with invoices, shipping docs, and status updates
- View recent and active orders
- See current lead times in real time

Service

- Centralized announcements
- Contact information for support

Tools

- Self-service portal for quotes, orders, and requests
- Access to the new Hytrol CPQ Tool



MyHytrol- Customer Self Service

myHYTROL

PRODUCTS ▾ SOFTWARE DOWNLOADS ▾ QUOTING & DESIGN ▾ ORDERING ▾ LOGISTICS ▾ TRAINING ▾ WORKING WITH HYTROL ▾ MY ACCOUNT ▾

WELCOME, JOE! Bastian SOLUTIONS

LEAD THE WAY

ORDERS

START NEW ORDEREXPORT OPEN ORDERS

Integration Partner

(13573) Bastian Solutions of Indiana

PO #

System ID

Bill of Lading #

Start Date (mm/dd/yyyy)

FO #

Serial #

Consolidated Invoice #

End Date (mm/dd/yyyy)

SEARCH ORDERS

Order Docs	PO #	Customer	Date Received	# of FOs	PO Total \$	Amount Due \$	First Order Ship Date	Last Order Ship Date
	48392017	ForgeLine Industries	12/19/2024	89	\$89,326.10	\$10,030.12	12/30/2024	5/15/2025
	72938401	Titan Axis	12/19/2024	106	\$103,526.20	\$8,146.21	1/5/2025	4/30/2025
	19283746	CoreMek Solutions	6/4/2025	1	\$402.01	\$402.01	Not Shipped	Not Shipped
	56392038	Ironvale Manufacturing	3/3/2025	142	\$2,219.98	\$124.10	3/15/2025	5/18/2025
	82039475	StrataForge	5/21/2025	1	\$1,137.26	\$1,137.26	Not Shipped	Not Shipped
	10384729	Precision Arc	4/7/2025	77	\$80,970.21	\$60,250.32	4/10/2025	6/1/2025
	94837201	Precision Arc	4/9/2025	1	\$9,506.87	\$538.12	5/5/2025	6/1/2025

LIVE HELP

EMAIL

CALL 1-800-458-8785

myHYTROL

Bastian SOLUTIONS

LEAD THE WAY

ORDERS

START NEW ORDEREXPORT OPEN ORDERS

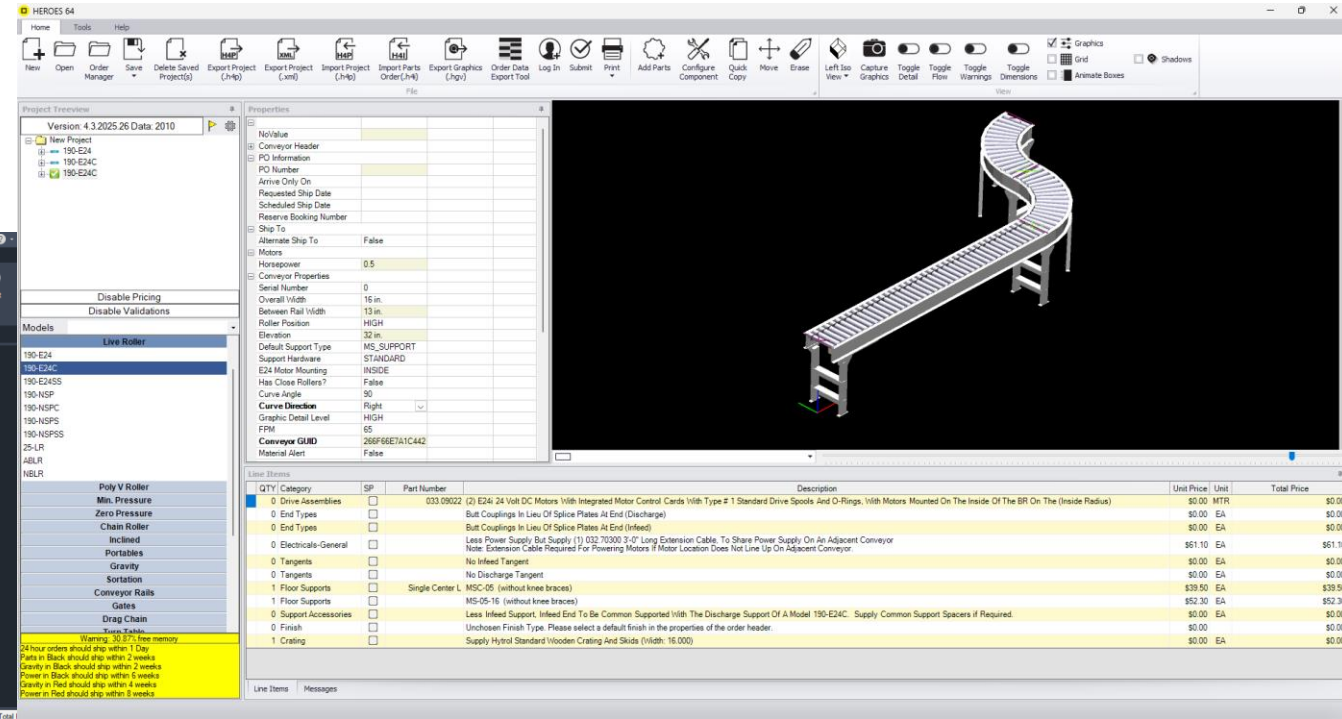
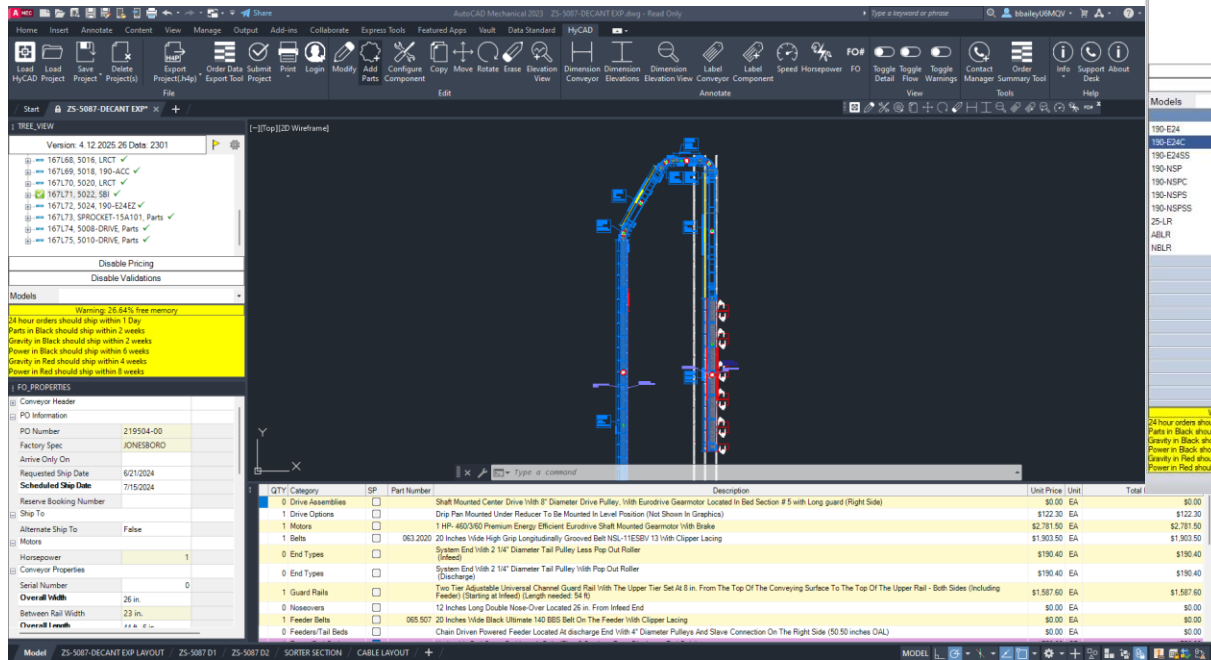
SHOW/HIDE SEARCH FIELDS

Integration Partner

(13573) Bastian Solutions of Indiana

Design Tool

Recognize these familiar sights and tools?



POWERED THROUGH PARTNERSHIP



Optimize Our Sales Tool & Experience

HEROES & HyCAD



Desktop Application
Must download desktop applications



CAD
CAD version requirement



Communication
Order communication happens outside the software environment



Disjointed Systems
Must use different applications to accomplish different tasks (design, order entry, order status, support)



Pricing
Manual pricing updates

VS

Hytrol CPQ



Cloud Based
Open online configurator



Design Now
Model/option suggestions



Modelling
Live 3D Model & Augmented Reality



Live Pricing and Inventory
Real-time parts costs and availability



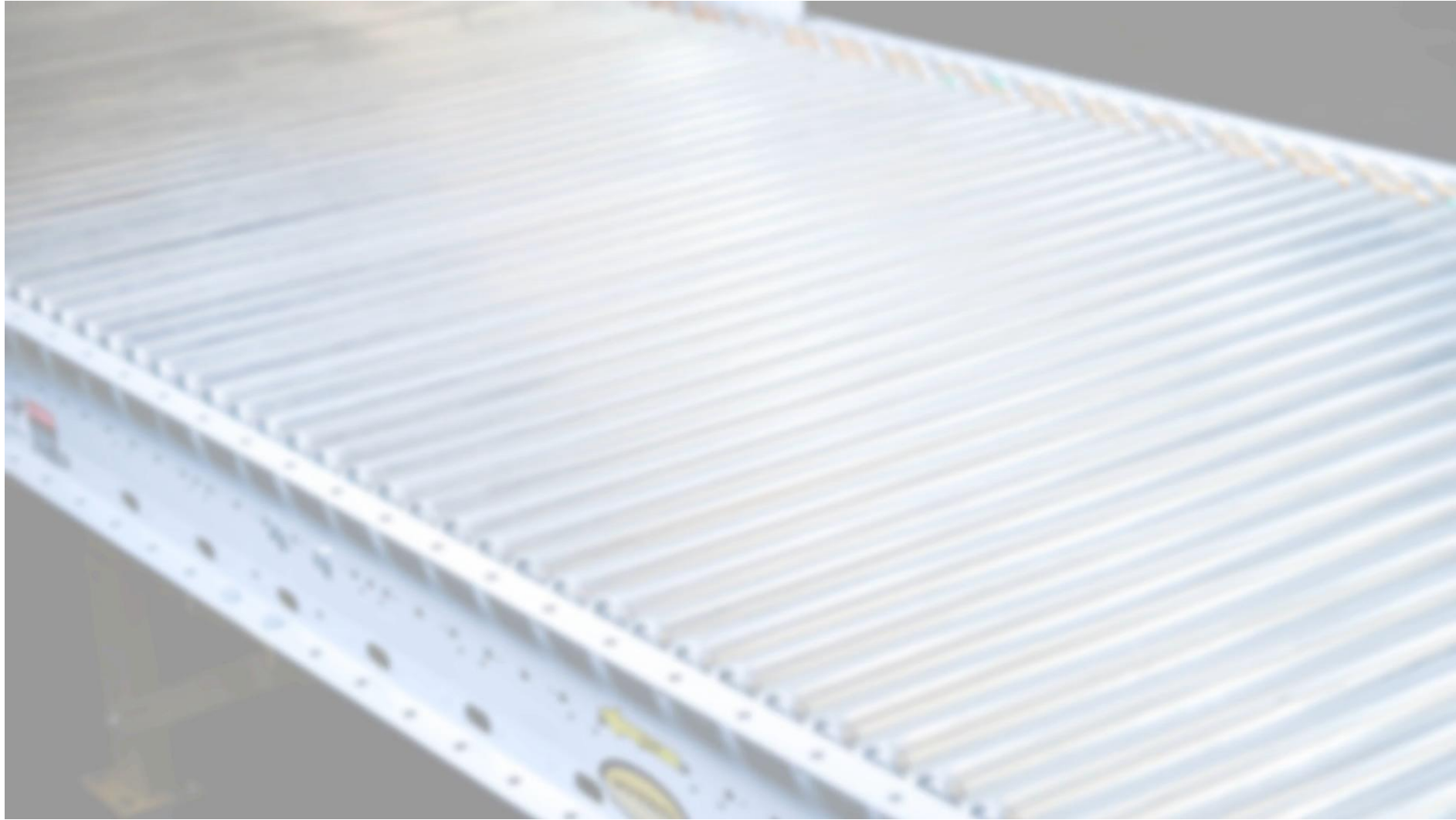
Automation
Automated BOM and Documents



Quote
Order / Design CAD models, technical drawings



Introducing -Hytrol CPQ - Design Tool



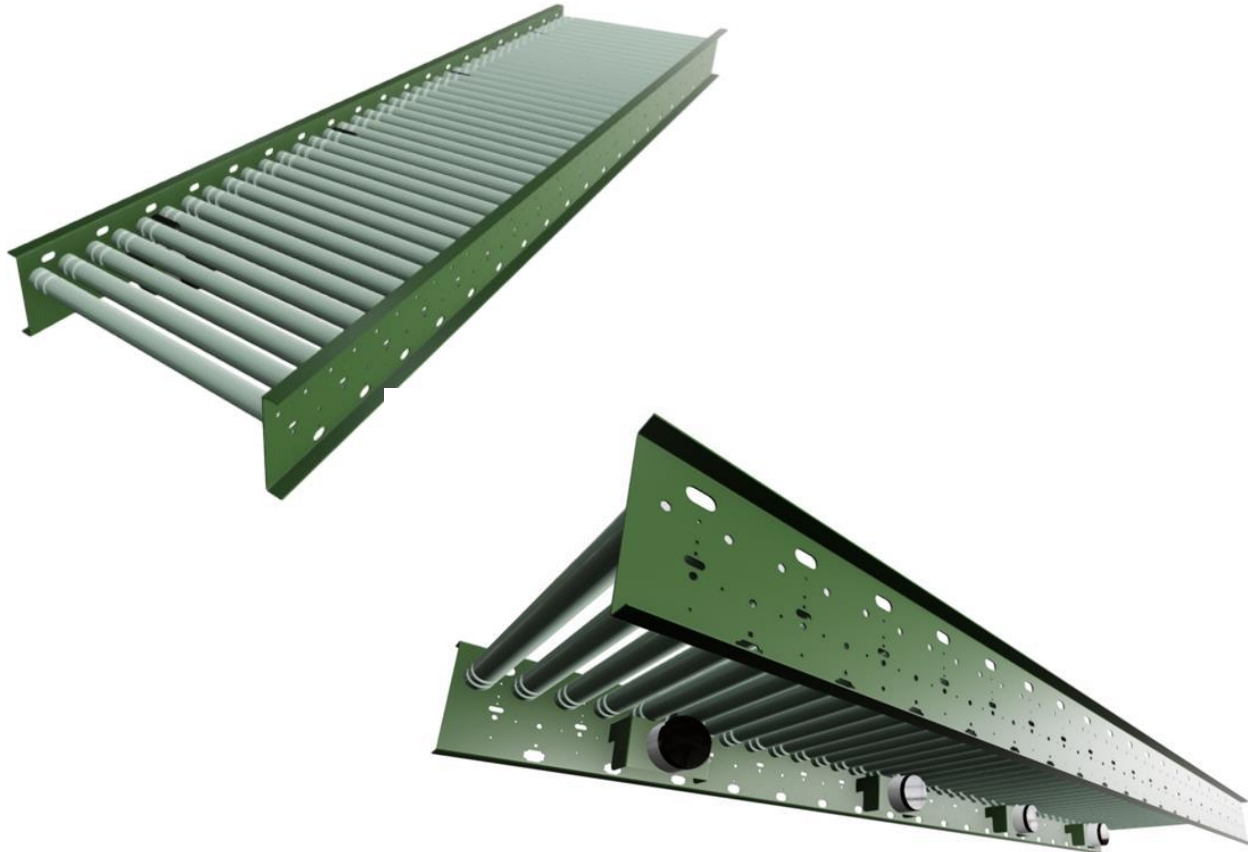
04

Key Highlights & Takeaways

A dark blue rectangular area containing a yellow spotlight beam shining down from the top left onto a yellow oval on the floor. The text "SPOTLIGHT ON THE TAKEAWAYS" is centered within this area.

SPOTLIGHT ON THE
TAKEAWAYS

Hytrol CPQ – Visualization



- Guided feedback during design
 - Warnings
 - Indicators
 - Suggestions
- 3D Models
 - Live configuration changes in the visual pane
 - Export 3D models in a variety of formats
 - Use the CAD of your choice
- Improved detailed system layout


Hytrol CPQ Live Bill of Material



- Always up-to-date
- Data is live and updates with changes
- Recommended Spare Parts at time of order
- Capacity and lead time changes with your order details
- Downstream processes receive visibility of what is coming sooner
 - Purchasing
 - Inventory Management
 - Manufacturing
 - Capacity Planning

Bill of Material							
Recently updated New 0 Updated 1 Removed 0							
Part Number	Description	Unit Cost	Qty	Cost	PricePerFoot	StandardPrice1	finalStandardPrice
190-E24							
1016-S120E3307H							
E24_Lv_Rlr_Frm_Asy							
SA-091095-BR	120" Frame Set Sigma	0	2	0.00	0.00	0.00	0.00
1011-048B1AH							
033.090141	Motor 48 Watts DC	0	4	0.00	0.00	0.00	0.00
033.090131	3.5 hp Control Card 48W, 60W	0	4	0.00	0.00	0.00	0.00
094.41501	Standard Drive Spool 1:1 2-Groove	0	4	0.00	0.00	0.00	0.00
090.25604	O-Ring	0	4	0.00	0.00	0.00	0.00
090.255824	O-Ring	0	4	0.00	0.00	0.00	0.00
INSDMNT	E24 Inside Motor Mount	0	4	0.00	0.00	0.00	0.00

Hytrol CPQ

- Download estimates
- Request firm Quote
- Request Assistance
- Request Change Order
- % of Status Order complete




 Home Shop

Demo User 
152_1756404354618 

152_1756404354618 [Edit](#)

CUSTOMER: ACC-00001
CURRENCY: UNITED STATES DOLLAR
COUNTRY: UNITED STATES OF AMERICA

[Download estimate](#) [Request firm quote](#) [Delete](#)

Product	Quantity	Net Price	List Price
 CNVR-00031 Request assistance Reconfigure Details	<div>- 1 +</div>	\$0.00	\$0.00 
Hide details ^			
Configuration selections	Needs E24 Live Roller Conveyor Assembly Segment Type Need Segment Type Need  Straight		

SMARTER TOOLS

&

STRONGER PARTNERSHIPS

Bottom Line

- Modern tools
- More accurate lead times
- Visibility across lifecycle of order
- Real-time capacity checks
- Real-time inventory checks
- Scalable systems

From configuration to delivery, you'll have a more consistent, accurate, and responsive experience to keep your customers confident and coming back!

Feedback from IP
Network

NOV

11. 2. 2025

Start IP Testing /
Pilot

JAN

01. 26. 2026

IP Training

MAR

05. 03. 2026

Order
Transition

MAY

05. 15. 2026

GO LIVE

JUN

06. 01. 2026

Go Live – June 1, 2026

QUESTIONS? FEEDBACK?



Feel free to share QR
code with your team