

The Regular Quarterly Meeting of the Midwest User Group was called to order at 10:10 a.m. on Friday, August 22nd at Bloomingdale Golf Club located in Bloomingdale, Illinois. Calvin Dekker served as moderator for addressing opening business.

Calvin reviewed the date for the last quarter meeting:  
Quarter Four; November 14, 2014

Phil Coppola with Avalara presented on its tax solution Avatax. His presentation is attached for review in greater detail. Avalara is the largest streamlined sales tax certified service provider. Its tax solution works seamlessly with the various Epicor and Vantage products.

Calvin Dekker provided a presentation on BAQ's in Epicor 10. Some of the updates and highlights he provided included:

- Convenience of writing BAQ's to multiple companies
- Whoever is the author is the person who maintains the BAQ, there is a way to take ownership/change author
- Example provided was a simple updatable (one table) BAQ
- Demonstration of graphical designer, can still write SQL natively
- Gave a run through of the BAQ Designer
  - Example, clicking on link option, will show the tables that can be linked to, will automatically identify linking fields
  - Demonstrated applying a parameter
  - Sub query – to feed query to parent query
  - Function Call Parameters
  - Pivot SubQueries – can take a pivot and feed to parent query
- Used to be Pub. or dbo. now ERP. or ICE. for the database schema name.
- Ability to analyze query, can also set to run on a limited number example rows
- Epicor BAQ Designer can work against external data sources
- Can look at Where Used
- BAQ Search
- Action Menu to Export BAQ, same for Import BAQ (from one database to another)

Request was made for an Advanced BAQ's session at the November Quarterly Meeting.

After the break for lunch and networking, the meeting reconvened with a presentation by Fred Zelhart of CodaBears for SSIS (SQL Server Integration Services).

- Great for Imports and Exports
- Does not replace the DMT, does not call business objects
- Does things like working with grabbing EDI
- Another example: could use it to grab data (ODBC connection) such as Progress data from a previous Epicor Database
- Reviewed the various Tabs in Visual Studio
  - Control Flow

- DataFlow (define source of data, change data types if necessary, destination, mapping, transformation, setting error condition)

Rhonda Spah of Epical Technical Support Services gave a presentation regarding Epicor Support. She provided updates regarding the Service Center including Service Level Commitments, the present organization and future plans, Support Escalation Contact List, and Skill Based Routing. A few of the other highlights included:

- If something is scheduled as a fix for 9.05.703, that means it's targeted as a one-off fix. Contact Support to get your name on the email list to be contacted when the one-off is completed.
- Rhonda also spoke about the Customer Matrix Viewer where users can search for information on reported bugs.
- Data Scrubber Utility
- How to get the most out of Support

A copy of her presentation has been appended to the meeting minutes. The group has requested to have assistance from Support at the November meeting to present on how to use both Epic Web and Customer Matrix Viewer.

The meeting concluded at 3:00 p.m.

The next regular scheduled Epicor Midwest User Group Quarterly Meeting is scheduled Friday, November 14, 2014.

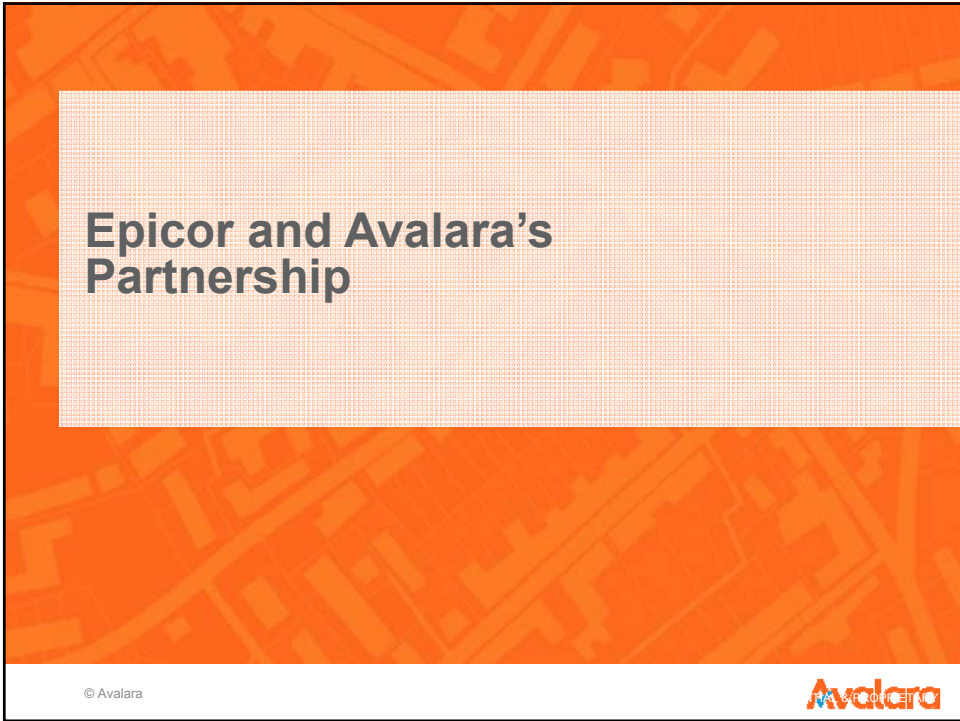
The advertisement features a solid orange background with a faint, stylized palm tree silhouette in the upper right. A white rectangular box with a fine grid pattern is positioned in the lower left. The text within this box is as follows:

**Epicor Tax Connect: Powered by  
Avalara AvaTax**

**Avalara AvaTax: A Cloud based Tax Engine**


The fastest, easiest, most affordable way to manage sales tax compliance.

At the bottom of the advertisement, there is a white horizontal bar. On the left side of this bar is the copyright notice "© Avalara", and on the right side is the Avalara logo.



**Epicor and Avalara's Partnership**

© Avalara



**Epicor's Partnership with Avalara**

- Epicor and Avalara have been partners since 2007
- Epicor and Avalara have proven, time tested integrations into many products (Epicor E10, Epicor 9, Enterprise, Vantage, Vista, Enterprise, Prophet 21, Prelude and Eclipse)
- Avalara provides a leading sales tax management solution
- Real-time access to the most current rates and taxability rules within any ERP includes: address validation, sourcing rules, jurisdiction assignment, product taxability, and reporting
- Largest Streamlined Sales Tax Certified Service Provider
- Backed by many years of tax expertise, 80+ Tax Experts on staff

Making sales tax less taxing

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## About Avalara

- Based on Bainbridge Island, WA
- Offices in Irvine, San Diego and Rocklin, CA;  
Falls Church, VA, Raleigh, NC, Harrisburg, PA and Pune, India
- Employ >500 people worldwide
- Over 10,000 active customers and over 50,000 registered users
- More than 25,000 returns processed per month, with over \$14b remitted in sales tax filings and over 500m transactions processed annually
- Provides an industry-standard tax engine with integration to over 225 ERP, eCommerce, mCommerce and Retail systems.
- Supplies an end-to-end solution for clients including tax calculation, exemption certificate management and returns processing services.
- SSAE16 SOC 1, Type 2 attestation to audit procedures



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## Sales Tax Challenge

© Avalara



## Agree or Disagree?

Understanding sales and use tax is one of the most confusing aspects of the accounting team's job?

# Agree!

73% of accounting professionals surveyed agreed.

Source: Wakefield Research Independent Study among 400 accounting professionals at companies with \$1 million or more in total revenue in 2013.



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## Agree or Disagree?

Which is easier- completing a marathon or understanding sales tax compliance laws?

# Agree!

52% of accounting professionals agreed

Source: Wakefield Research Independent Study among 400 accounting professionals at companies with \$1 million or more in total revenue in 2013.



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## Tax Quiz & Some Inconvenient Truths

© Avalara

**Avalara**  
AVOIDING TAXES

### True or False?

In Massachusetts, a clothing item costing up to \$175 is exempt from sales tax. However, any item costing \$175.01 and above is subject to the state sales tax.

# True!



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### True or False?

In Pennsylvania, state and U.S. flags are not subject to tax, but if either is sold with “accessories” (i.e., a pole), the entire purchase becomes taxable.

# True!



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## Accuracy is Everything

© Avalara





## Product Taxability Complexity

*Honey Roasted Nuts are taxable in NJ, KY, MD and NY states, while...*

*Salted Nuts are exempt in those same states.*



\*States Illustrated Above: NJ/KY/MD/NY



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## Sales Tax Compliance - Not just for retailers!

There are 3 things you have to do even if you are a manufacturer or distributor:

1. Collect Sales Tax when necessary
2. Show WHY you don't have to collect (sales tax exemption certificates)
3. A combination of one and two!



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## Challenges of Sales Tax Compliance

### *Compliance is complicated...*

- ▶ Involved process – calculate, report, return, remit
- ▶ More than 11,000 taxing jurisdictions
- ▶ Thousands of changes to tax laws, including:
  - Jurisdictional rate changes
  - Tax holidays
  - Jurisdictions that levy new taxes or eliminate taxes
  - Jurisdictions that expand geographic boundaries

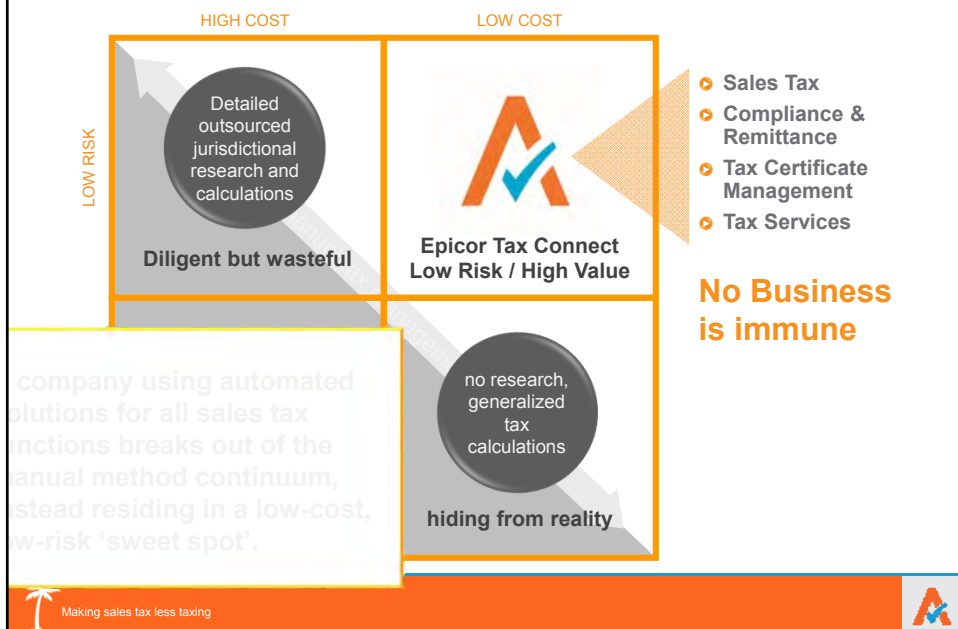
### *...Accuracy is everything*



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## The Manual Continuum



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### Sales tax rates by ZIP Code = **Inaccuracy**

Determining sales tax rates by ZIP codes is **inaccurate and risky.**

**7.85**  
80111 Taxes Represented:

- 2.9% Colorado State
- 2.5% Arapahoe County
- 1.0% Douglas County
- 3.5% Englewood City
- 3.0% Greenwood Village City
- 2.5% Centennial City
- 1.0% Regional Transport District
- 1.0% Football District
- .10% Science and Cultural District
- 7.35%
- 5.10%

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**7450 Leyden Street**  
Total Sales Tax: **0.0925**

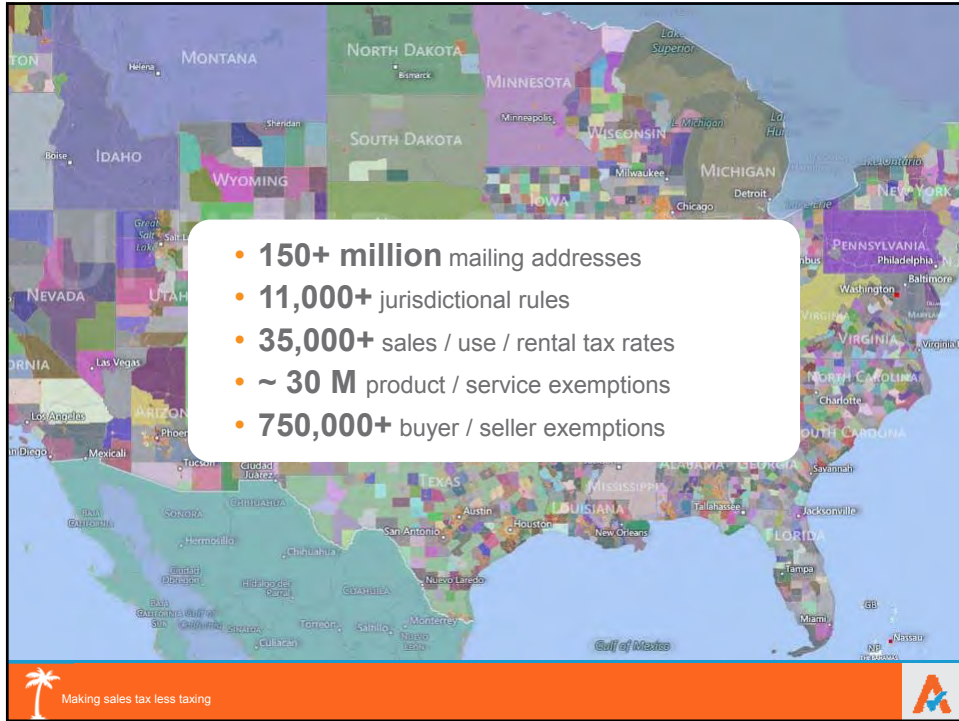
COLORADO: 0.0290  
ADAMS: 0.0075  
COMMERCE CITY: 0.0450  
SCIENTIFIC & CULTURAL: 0.0010  
DENVER AREA TR: 0.0100

**7495 Locust Street**  
Total Sales Tax: **0.0475**

COLORADO: 0.0290  
ADAMS: 0.0075  
SCIENTIFIC & CULTURAL: 0.0010  
DENVER AREA TR: 0.0100

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A



A map of the United States with a callout box in the center. The callout box contains the following statistics:

- **150+ million** mailing addresses
- **11,000+** jurisdictional rules
- **35,000+** sales / use / rental tax rates
- **~ 30 M** product / service exemptions
- **750,000+** buyer / seller exemptions

At the bottom left of the map area, there is a palm tree icon and the text "Making sales tax less taxing". At the bottom right, there is a logo with the letter 'A'.



The slide features a background with a repeating geometric pattern of orange and white squares. A large white rectangular area in the center contains the text:

# Epicor Tax Connect

At the bottom left, there is a small copyright notice: © Avalara. At the bottom right, there is the Avalara logo, which consists of the word "Avalara" in a stylized font with a red 'A' and the tagline "THE WORLD OF TAX" below it.

# Epicor Tax Connect - Sales Tax Compliance

- **Tax return preparation**
  - Tax detail by jurisdiction reconciliation
  - By invoice, invoice line, invoice line detail
  - View transaction detail and status
- **Reporting and Filing**
  - Data exports in CSV, Excel, PDF, xml, TIFF, web archive
  - Details map to your state/local returns forms
- **Remittance**
  - Outsourced returns processing
  - Single amount transferred through Tax Connect for tax liability
  - Avalara distributes returns and payment



# Epicor Tax Connect - Sales Tax Calculation

- **Easy to Use**
  - Single dashboard configuration specific to your requirements
  - Embedded integration into your application
- **Address Validation**
  - Street level accuracy for all jurisdictional assignment; GPS like technology
  - USPS CASS Certified address validation
- **Taxation**
  - Most accurate tax rate assignments
  - SITUS – location source of tax
  - Origin, destination, hybrid
  - Product taxability







**Product Demonstration**

© Avalara 



**Avalara**

**Questions**

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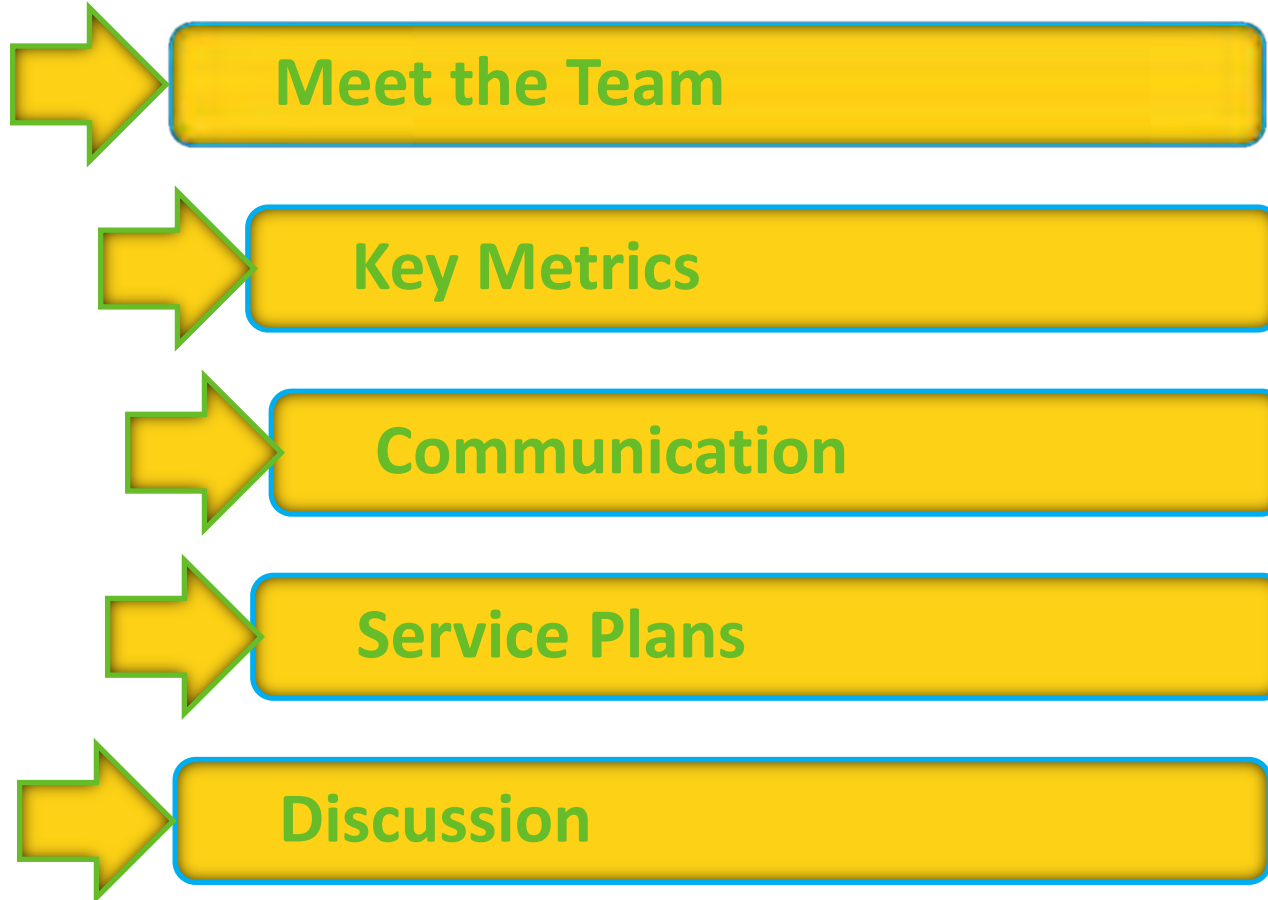


# Epicor Support

Rhonda Spah  
Director, Support

**EPICOR.**  
Business Inspired™

# Agenda



# Team

Rich Jaso – SVP

Joe Jasper – VP Americas

Amy Keusch – Director, Support

Rhonda Spah – Director, Support

Deb Desarmeaux – Support Manager – Application

Virginia Johnson – Sr. Support Manager – Technical

Anabell Martinez – Director, Monterrey Office

Patricia Lerma – Manager Support, Application

Raul Suarez – Manager Support, Application

David Alvarez – Manager Support, Technical



# Epicor Global Support: “Follow-the-sun”

Improved visibility with global infrastructure

13 Support Centers worldwide

Support in over 20 languages

Global CRM and telecommunications system

300+ Americas Support professionals worldwide – All direct employees

Average six years tenure





## Instructor-Led Courses

- Classroom
- Virtual courses
- Worldwide access to over 100 courses with instructor, solution, and real business data



## Self-Paced Learning

- Embedded courses
- Epicor knowledge mentor
- On-demand tutorials
- Learning available at any time

### Indirect Labor

Indirect labor is a category of labor that is not directly involved in the production of goods or services. It includes labor that is used to support the production process, such as maintenance, security, and administrative services.

To create a new indirect labor code:

1. In the **Setup** window:

A. In the **Indirect Labor Code** field, enter the code.

B. In the **Description** field, enter the description of the indirect labor code.

C. In the **Expense Code** field, select the expense code that you want to use for this indirect labor code.

D. In the **Rate** field, enter the rate for this indirect labor code.

E. When you finish, click **Save on the Standard** button.



### Role Codes

Role codes define a position an employee can hold on a job or project. Employees can have assigned roles on their system, company, and project. Role codes are used to track employee time and labor. The system also uses Role Code Maintenance and Job Role Maintenance to track employee and project data.

Steps to create a new role code:

1. In the **Setup** window:

A. Enter the role code for the role.

B. Enter the role description for the role.

C. In the **Expense Code** field, select the expense code that you want to use for this role code.

D. In the **Rate** field, enter the rate for this role code.

E. When you finish, click **Save on the Standard** button.



## Documentation

- Illustrated, detailed instructions of major application functions
- Online, printed, or eBook options

100+ Americas support representatives Epicor certified

# Service Level Commitments

SERVICE LEVEL	COMMITMENT/GOAL
Response Time	Immediate or within one hour (phone contact)
Escalation	Any issue, at any time
Status Update	Daily updates for all priority issues
Close Process	Only upon customer approval
Hold Time	0-2 minutes
Resolution Target	Immediate response with continued top priority focus through resolution
Survey Response	9+ (Scale 1-10)



# Epicor Support Escalation Contact List

“World-class customer support is Epicor’s objective and we have many processes in place to ensure the quality of our service. However, please use these contacts at your discretion when you feel additional focus or effort is required on critical issues. Epicor will respond appropriately and work tirelessly to ensure your issues are addressed in a timely manner.”

Rich Jaso, Sr. Vice President of Support

## Americas Managers

### Manufacturing Application Support

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# Survey Methodology

Every closed incident  
6 questions + comments  
Analyst/Manager bonus  
Global target is 9.2

## Survey comments

### Epicor Support Feedback

Thank you for using Epicor Support.

For this survey please limit your feedback solely about, **John**, the Support Analyst, who last helped you with the following call number:

**1234567XYZ - 'Test call summary'**

SUPPORT ANALYST

Please rate your satisfaction on a scale of 1 to 10, 10 being extremely satisfied and 1 being extremely dissatisfied. If the question does not apply to your incident, please do not enter a response. Please rate the performance of the Support Analyst who assisted you. As we are using your opinion to judge customer satisfaction as well as the performance of our people, please try to rate the Analyst's performance objectively irrespective of your satisfaction with the resolution itself.

Was the Support Analyst courteous and professional?

Did the Support Analyst have sufficient knowledge to address your issue?

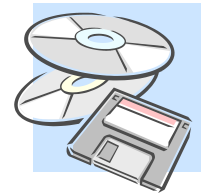
How well did the Support Analyst keep you informed of the status and progress of your issue?

Was your issue addressed in the timeframe communicated by the Support Analyst?

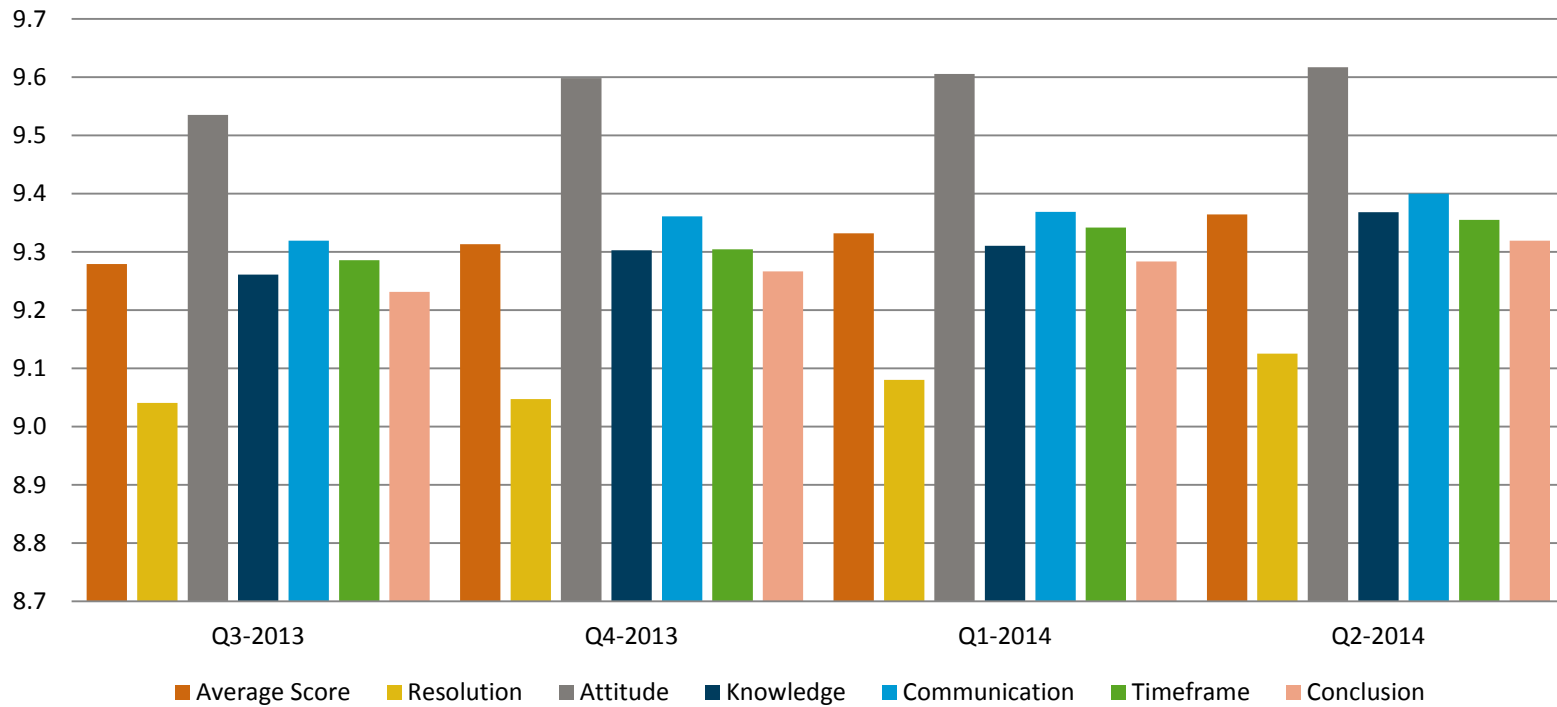
Do you feel the Support Analyst effectively addressed your issue?

We appreciate any comments you have about the Support Analyst who assisted you.

# Epicor ERP Survey Results

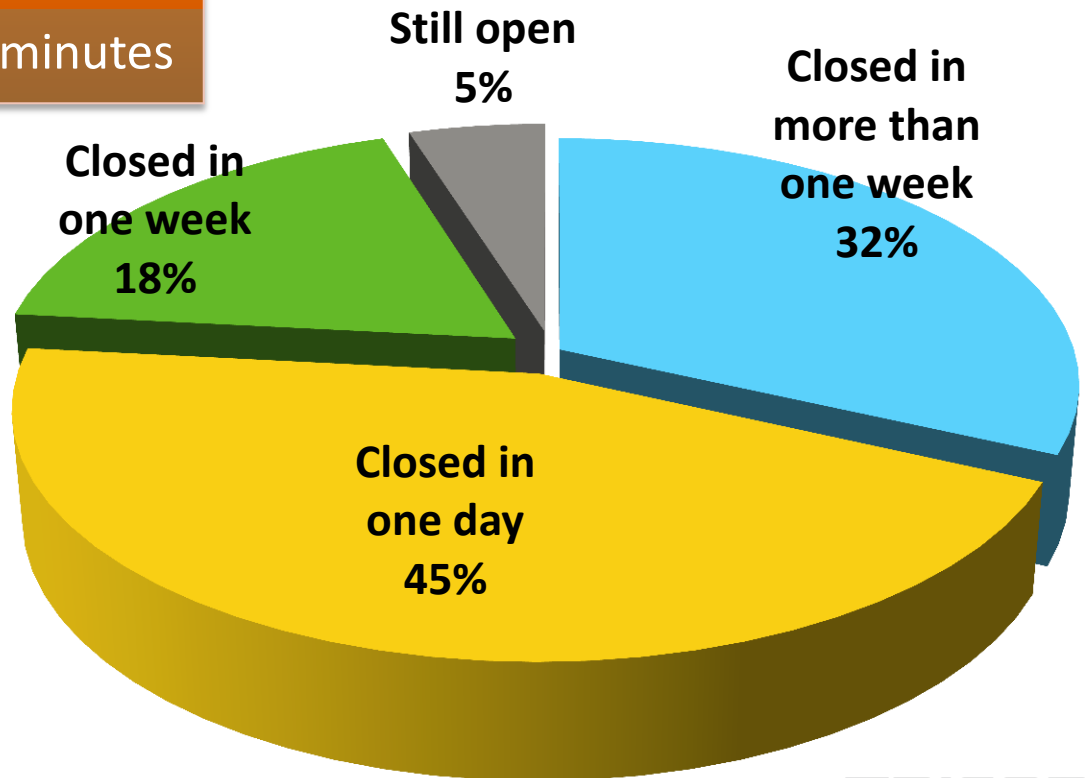


## Epicor ERP WW Incident Survey Average (on a scale of 1-10)



# Metrics & Measurement – Current Support Indicators

Helpdesk calls per year	111,000
Direct response rate	91.4%
Average hold time	1 min 39 sec
Average call length	13:36 minutes



\*Source: Epicor Support Call Data Jan-Dec, 2014

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# ERP Skill-Based Routing



## Press 1 Production Modules

- **Press 1:** Sales Management, Shipping, Receiving
- **Press 2:** Service Management or CRM
- **Press 3:** Production Management & Engineering, Time Management
- **Press 4:** Material Management
- **Press 5:** Advanced Production Modules

## Press 2 Financial Modules

- **Press 1:** Accounts Receivable, Multi-Currency, Cash Management, Accounts Payable, Expense Management, General Ledger, Advanced Allocations, Credit Cards
- **Press 2:** Epicor Payroll and Fixed Assets
- **Press 3:** Advanced Financial

## Press 3 Technical Issues

- **Press 1:** Installation/upgrades assistance
- **Press 2:** Reporting, Printing, Crystal, ODBC, SSRS, Global Alerts, BAM
- **Press 3:** System Administration
- **Press 4:** Demand Management, EDI, Epicor Commerce, Connects, Web Access, BPM
- **Press 5:** ICE Framework Tools including Personalization, Style & Themes, Customization, BAQs and Dashboards

## Press 4 Third Party

- **Press 1:** Production Products: IQS, PLM and Qbuild
- **Press 2:** Financial Products: Open4 Payroll and Human Resources, Management Reporter, FRx, Active Planner, and Tax Connect
- **Press 3:** Product Integrations and BI Reporting: EPM, Altec, Corvu, and other 3rd Party Integrations

## Press 5 System Down

# Development Process

## Software Change Request:

- ❑ Issue reproduced
- ❑ Issue reproduced and submitted to development
- ❑ SCR assigned and confirmed
- ❑ Customer contacted
- ❑ Development Review Board
- ❑ SCR Targeted for future service pack or TBD
- ❑ EPR (Emergency Patch Release)

## How do I get an update:

- ❑ Support contacts customer after SCR assigned
- ❑ Email to user when SCR available on a service pack that goes GA
- ❑ EPICweb – click on SCR field
- ❑ EPICweb Change List
- ❑ Customer Matrix Viewer
- ❑ Contacting Support



# EPICweb

24x7 Access to information, resources and services including:

- Live on-line chat
- Knowledge base
- Education and documentation resources
- Online forums and communities
- Download service packs and patches

The screenshot shows the EPICweb homepage. At the top, there is the EPICOR logo with the tagline 'Business Inspired'. To the right, there are social media icons and a 'Connect with Epicor' link. Below the logo is a navigation bar with links for Products, Resources, Partners, Education, Services, Community, Administration, and Project Control Center. The main content area features a large yellow banner with the text 'Partnerships Inspire Success' and a graphic of interlocking cubes. Below the banner, there is a 'Support' section with links to 'Epicor Support Statement of Services', 'Channel Partner Support Process', 'Epicor Support Statement of Services', 'Channel Partner Support VMI Agenda', and 'Partner Support Escalation Page'. On the left side, there is a sidebar with 'Contact Epicor', 'Provide Feedback', 'Submit a Support Call', and 'Search Site' buttons. Below these are 'Employee Resources' and 'Partners' sections with search options.

My EPICweb:

- Account information
- manage company contacts, view support contacts
- Enter and track status of support incidents
- Chat directly with support reps
- Set up and manage alerts

The screenshot shows the 'Submit a Support Call' form. The form includes fields for Site ID, Site Users, Location, Product Line, Module, Version, Call Type, Options, Reference #, Summary, and Details. There are also 'Attach File' and 'Post Call' buttons. The form is set against a light gray background with a white border. The EPICOR logo and tagline are visible at the bottom left of the form area.

# New EPICweb Website Benefits

Newly Branded & Enhanced Information Architecture

- New Display for Account Management Contacts, Calls Summary
- Personalized and Focused Experience for each User Role
- Customer, Partner, or Epicor Internal

Robust, Load Balanced, high-availability Server Architecture

Latest Versions of SharePoint 2013 Framework & SQL server 2012

Improved Security Model across all aspects of EPICweb, including Product Downloads

“Self Service” Account Creation and Management

Improved PCC Site model with Site Collection scope

Improved Site Search user experience



# Support Newsletter - Quarterly



## Epicor Support Newsletter

### Welcome!

Welcome to our new quarterly Epicor Support Newsletter. This newsletter is tailored to Epicor support customers to share timely announcements, important product updates, as well as give you an inside look into the support organization and its members who work hard every day to provide you with the best service possible. We hope you enjoy this premiere issue.

### Our Commitment to You

Epicor Support's mission is to provide a suite of services to support you and your organization throughout your lifetime as an Epicor customer. We strive to help you maximize the benefits realized from your Epicor investment. Each of our support members are empowered to fulfill our commitment to you:

### In This Issue

[Welcome!](#)

[Our Commitment to You](#)

[What's New in Support?](#)

[Technology Corner](#)

[We Are Listening...](#)

[Meet A Member of Our Team](#)

### Useful Links & Resources

[Epicor Knowledge Base](#)

# What's New in Support

## What?

### Data Scrubber Utility

- Collection of standardized code segments that can be put together to scrub a customer's database and look for data issues
- Scrubs can be generated by module and contain all related scrubbers
- Customer will return a log file from running the scrubber which will contain a list of problems and related fix programs that need to be sent

## Why?

- Epicor can be proactive in searching for customer issues
- All scrubber and related fix programs will have the same look and feel for the customer
- Because code is standardized, same scrubber code will be available across Epicor versions 8.03 to 9.05
- Coding will be expanded to cover E10 as well

# Development Support Scrubber Utility

Scrubbers will be created by table and column so they can be easily grouped

The scrubber editor is designed to make coding standardized and efficient

The screenshot displays the 'Development Support Scrubber Utility' interface. It features a main window with three panes: 'Tables', 'Columns', and 'Scrubbers'. The 'Scrubbers' pane shows a list of scrubbers with columns for Table, Parent, Child, Active, Solution, Type, Verified, and Description. One scrubber is highlighted: 'checked' for table 'Company', solution '37122MPS', type 'Update', and verified.

Below the main window is a detailed configuration window titled 'Scrub checked for Update'. It includes a toolbar with 'Save and Close', 'Save', 'Save and New', 'Delete', 'Scrubber', and 'Scrubber Script'. The configuration includes:
 

- Primary Table: checked
- Action: Update
- Parent Table: Company
- Solution: 99999esc
- Active:
- Scrub Find:
- Verified:
- Scrub Update:

 A text area contains the scrubber script: 'Scrub checked and update. Search checked based on Company using primary key where company is prompted company key and headnum is prompted headnum key. Filter by bankacctid is null, fiscalyear is null and posted = no. Update checked and copy company from Company then set bankacctid to prompted company key, groupid to script value and posted to yes.'

Below the configuration window are three tables:
 

- Primary Key:**

ID	Column	Parent Link	Child Link
1	company	Key_company	
4	headnum	Key_headnum	
- Filter Checked by:**

ID	Column	Operator	NULL	Filter Value	Logic
1	company	=	<input type="checkbox"/>		and
2	posted	=	<input type="checkbox"/>	No	and
3	groupid	=	<input checked="" type="checkbox"/>		and
4	headnum	=	<input checked="" type="checkbox"/>		and
5	bankacctid	=	<input checked="" type="checkbox"/>		
6	checknum	=	<input type="checkbox"/>		
7	checkdate	=	<input type="checkbox"/>		
8	fiscalyear	=	<input checked="" type="checkbox"/>		
- Fields to Update:**

ID	Column	ID	Column	Buffer Copy Excl	Assigned In Scrip	New Value
4	headnum	1	company	<input type="checkbox"/>	<input type="checkbox"/>	Company.company
6	checknum	2	posted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
7	checkdate	3	groupid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Value assigned in script
8	fiscalyear	5	bankacctid	<input type="checkbox"/>	<input type="checkbox"/>	Key_company
9	fiscalperiod					
10	voided					



# How Do I Get the Most Out of Support

Install service pack upgrades & patches

Follow the Support Escalation Process

Utilize EPICweb

Understand logs that need to be generated to expedite troubleshooting

Cleanse data

Utilize Epicor Education & Epicor Professional Services

Stayed tuned on EpicCare!

Automated Positive Call Closure

Provide Feedback!





# Summary

## Epicor Support Differentiators...

- 100% direct Epicor employees
- Dedicated team with average 6 years industry experience
- Extensive self-service options available
- Global capabilities and infrastructure
- Support in over 20 languages
- Comprehensive technology and toolkit
- Support of all elements of our “Protect, Extend, Converge” strategy
- “Open door policy” with escalation option at any time for any issue



# Questions / Feedback



Thank You!

# Epicor Support Management Contact List

“World-class customer support is Epicor’s objective and we have many processes in place to ensure the quality of our service. However, please use these contacts at your discretion when you feel additional focus or effort is required on critical issues. Epicor will respond appropriately and work tirelessly to ensure your issues are addressed in a timely manner.”

Rich Jaso, Sr. Vice President of Support

## Americas Managers

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**EPICOR®**

**Customer Matrix Viewer  
Epicor 9**



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# 1 Using the Customer Matrix Viewer

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Use the following steps to review functionality available in the Customer Matrix Viewer.

## 1.1 Access Customer Matrix Viewer

---

Use these steps to open and log into the Customer Matrix Viewer.

1. Verify you have a valid username and password for accessing the EPICweb Customer portal. If you need to create an EPICweb account, go to <http://support.epicor.com>.
2. Enter the Enterprise Search Matrix URL into your web browser. You can also click this link: [scrs.epicor.com](http://scrs.epicor.com)
3. Enter your EPICweb username and password to log into the site. Your username format must include "**web\**" prior to the username. For example, the format must be: `web\[username]`.  
When the site opens, it looks similar to the following:



4. When results are displayed, the default is to display ten records per page. If you want to change the default, do the following:
  - a. Click the **Show Advanced Search Options** link.
  - b. Enter a new value in the **Results Per Page** field.
  - c. Click the **X** to accept the new value and close the field.

## 1.2 Review Search Criteria

---

Use these steps to review the available information for using search criteria, including module names.

1. Click the **Help** icon (question mark) in the upper right corner of the site. The Customer Matrix (Enterprise Search) - Advanced Search Queries help topic opens in a new browser window.
2. Review the available search criteria details. Search criteria includes:
  - Basic search
  - Phrase search
  - Wildcard search
  - OR search
  - Explicit Without search

- Search keywords
- Data Tag keywords
- Date search

3. Close the browser window to close the help topic.

## 1.3 Review Module List

Use these steps to review the module identifiers that are used to specify modules in the Customer Matrix Viewer. You can use these module names for searching, if desired.

The modules are listed by Functional Area: Executive Management, Financial Management, Production Management, Sales Management, Supply Chain Management, System Wide Enhancements, Tools and Technologies.

1. Review the modules in **Executive Management**.

Module Code	Description
BAM	Business Activity Manager
EX	Executive Dashboard

2. Review the modules in **Financial Management**.

Module Code	Description
AA	Advanced Allocations
AFR	Advanced Financial Reporter
AP	Accounts Payable
AR	Accounts Receivable
CA	Cash Management
CSF	Country Specific Functionality
CUR	Currency Management
DRA	Deferred Revenue Accounting
FA	Fixed Assets
GJ	Multi-site GL Journals
GL	General Ledger
MR	Management Reporter
MS	Multi-Site Management
PR	Payroll
PY	Consolidated Payment
RP	Rebates, Promotions and Royalties

### 3. Review the modules in **Production Management**

Module Code	Description
APD	Advanced Production
APS	Advanced Planning and Scheduling
BOM	Engineering
DC	Data Collection
EM	Expense Management
EQA	Enhanced Quality Assurance
FS	Field Service
JM	Job Management
MM	Preventive Maintenance Management
MRP	Material Requirements Planning
PB	Project Billing
QA	Quality Assurance
SCH	Scheduling
TM	Time Management

### 4. Review the modules in **Sales Management**.

Module Code	Description
CRM	Customer Relationship Management
Dashboards	Dashboards
EDI	EDI
EQ	Quote Management
HD	Help Desk
OM	Order Management
PC	Product Configuration
PJ	Project Entry
Plan Entry	Plan Entry
QM	Quote Management
SS	Demand Management

### 5. Review the modules in **SupplyChain Management**.

Module Code	Description
AMM	Advanced Material Management
AS	Advanced Shipping Management

<b>Module Code</b>	<b>Description</b>
CP	Consolidated Purchasing
HH	Handheld MES
IM	Inventory Management
PH	Purchase Scheduling
PM	Purchasing Management
SR	Shipping / Receiving
SRM	Supplier Relationship Management
XS	ExpressShip

6. Review the modules in **System Wide Enhancements**.

<b>Module Code</b>	<b>Description</b>
CD	Credit Card Processing
FRX	FRx
HLP	Help and Documentation
PLM	Product Lifecycle Management

7. Review the modules in **Tools and Technologies**.

<b>Module Code</b>	<b>Description</b>
AFR	Advanced Financial Reporting
APM	Advanced Print Management
BAM	Business Activity Manager
BAQ	Business Activity Query
BPM	Business Process Management
CC	Customer Connect - Storefront
CRY	Crystal Reports
CUST	Customization Engine
DASH	Dashboards
DCRM	Mobile Connect
DCU	Data Conversion Utility
DOC	Document Management
EEPM	Enterprise Performance Management
EP	Epicor Portal
ES	Enterprise Search
ESC	Epicor Service Connect



Module Code	Description
EWA	Epicor Web Access
EXP	Epicor Express
INFO	Information Worker
PDT	Performance Diagnostic Tool
PRG	Progress
REPL	Replication Server
SDK	Software Development Kit
WDB	Sharepoint Publisher

## 1.4 Enter Search Criteria

---

Use these steps to enter search criteria into the Search field.

1. Enter your specific criteria in the search entry field. For example, to find SCRs related to Epicor Web Access, enter "EWA".
2. Click the **Search** icon (magnifying glass) to start the search.
3. Review the results listed.



**Tip** By default, ten records are displayed per page. To change the default, click the **Show Advanced Search Options** link. Enter a new value in the **Results Per Page** field. Click the **X** to accept the new value and close the field.

4. To narrow your search, you can enter additional search criteria. For example, to find SCRs related to both Epicor Web Access and 9.05.604, enter "EWA 9.05.604". The search criteria finds all records with "EWA" and "9.05.604".

## 1.5 Switch to Grid View

---

Use these steps to use the grid view of the results.

1. Enter your search criteria and click the **Search** icon (magnifying glass) to begin the search. The results are displayed in a Classic view. The Classic view is in paragraph form with fields separated by commas.
2. To switch to a Grid View, click the **Switch to Grid View** link on the upper right corner. The results are then displayed in a Grid View. The Grid View is in table format with rows and columns. The total count of rows displayed is shown in the **Show Grid** field above the table.

## 1.6 Switch to Classic View

---

Use these steps to use the classic view of the results.

1. Enter your search criteria and click the **Search** icon (magnifying glass) to begin the search. The results are displayed in a Classic view. The Classic view is in paragraph form with fields separated by commas.
2. If you switch to the Grid View, and then want to switch back to the Classic View, simply click the **Switch to Classic View** link on the upper right corner.
3. On the Classic View, each SCR is listed with options to view more information. Options include: Job Tracker, Job Entry, Multi-Level Pegging Display.

## 1.7 Copy or Export Records

---

Use these steps to copy records or export records into Microsoft Excel. The records are exported as a .csv (comma separated values) spreadsheet file.

Note that you can copy records from either the Classic or Grid view, but you can only Export from the Grid View.

1. From the results list, select the record that you want to copy.
2. Click **Copy** to copy the entire record. The record is copied to your copy buffer. If prompted for access to your clipboard, click **Allow Access**.
3. You can now paste the record into another program. For example, you can paste the record into a spreadsheet or email.
4. Using the Grid View, you can copy the entire table. To do this, click the **Copy Table** button. The table is copied to your copy buffer, and you can paste it into another program, if desired.
5. Using the Grid View, you can export the records to Microsoft Excel. To do this, click the **Export to Excel** button.
6. When prompted, click **Open** to open the spreadsheet . You can begin editing the spreadsheet, or save it to a location.

## 1.8 Specify Advanced Copy Options

---

Use these steps to review the options available for advanced copying of record results.

1. From the results list, select the record or records that you want to copy.
2. Click the **Advanced Copy** link.
3. Review the Advanced Copy Options. The options include the following:

Copy as:  Form  Table

Copy which records?:  Current Match  All Matches

Include:  Column Names

**Include Column Selection**

- Record Description
- SCR
- Part
- Description
- Priority
- Severity
- Type
- Module
- Found In
- Product
- Company Context

Advanced Copy Options

4. Enter your copy selections.
5. Click **Copy** to copy the records. The records are copied to your copy buffer.
6. You can now paste the records into another program. For example, you can paste the records into a spreadsheet or email.
7. Click the **X** to close the dialog.

# EPICOR.

Additional information is available at the Education and Documentation areas of the EPICweb Customer Portal. To access this site, you need a Site ID and an EPICweb account. To create an account, go to <http://support.epicor.com>.