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

      o 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.

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.

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

CONFIDENTIAL & PROPRIETARY | 4

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

Making sales tax less taxing   CONFIDENTIAL & PROPRIETARY | 5

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.

Making sales tax less taxing   CONFIDENTIAL & PROPRIETARY | 7

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.

Making sales tax less taxing

Tax Quiz &
Some Inconvenient Truths

© Avalara

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!

Making sales tax less taxing

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!

Accuracy is Everything

Product Taxability Complexity

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

Salted Nuts are exempt in those same states.

Exempt

Taxable

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

Making sales tax less taxing

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!

Making sales tax less taxing

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

Making sales tax less taxing

The Manual Continuum

HIGH COST   LOW COST

LOW RISK

Detailed outsourced jurisdictional research and calculations

Diligent but wasteful

**Epicor Tax Connect
Low Risk / High Value**

- Sales Tax
- Compliance & Remittance
- Tax Certificate Management
- Tax Services

No Business is immune

company using automated
olutions for all sales tax
nctions breaks out of the
anual method continuum,
stead residing in a low-cost,
w-risk 'sweet spot'.

no research, generalized tax calculations

hiding from reality

Making sales tax less taxing

Sales tax rates by ZIP Code = Inaccuracy

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

Adams

pahoe

7.85

80111 Taxes Represented:
2.9% Colorado State
.25% Arapahoe County
1.0% Douglas County
3.5% Englewood City
3.0% Greenwood Village City
2.5% Centennial City
1.0% Regional Transport District
.10% Football District
.10% Science and Cultural District

4.35

4.35

6.85

7.72

7.35%

5.10%

Making sales tax less taxing

CONFIDENTIAL

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

Locust

Magnolia St

Kearrenia St

Leyden St

Monaco St

E 74th Pl

Making sales tax less taxing

- **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

Making sales tax less taxing

Epicor Tax Connect

© Avalara

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

Making sales tax less taxing
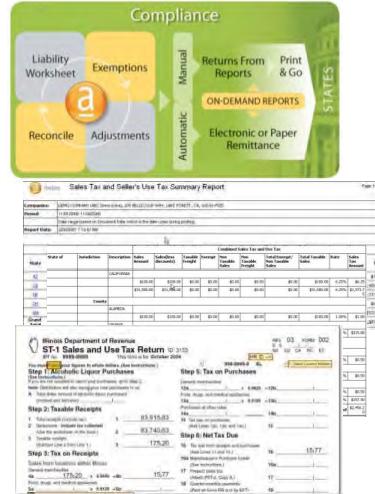
Epicor Tax Connect - Sales Tax Calculation

- **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
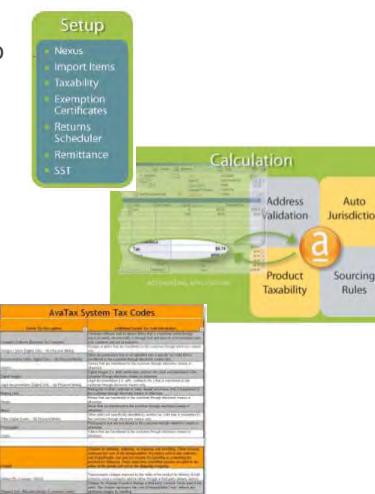
Making sales tax less taxing

Product Demonstration

© Avalara

Avalara

Questions

Phil Coppola, Regional Sales Director - East
Direct Line: (206) 826-4900 x 6025
Phillip.coppola@avalara.com

Robin Emanuel, Regional Sales Director - West
Direct Line: (206) 826-4900 x 3003
Robin.emanuel@avalara.com

Making sales tax less taxing   24
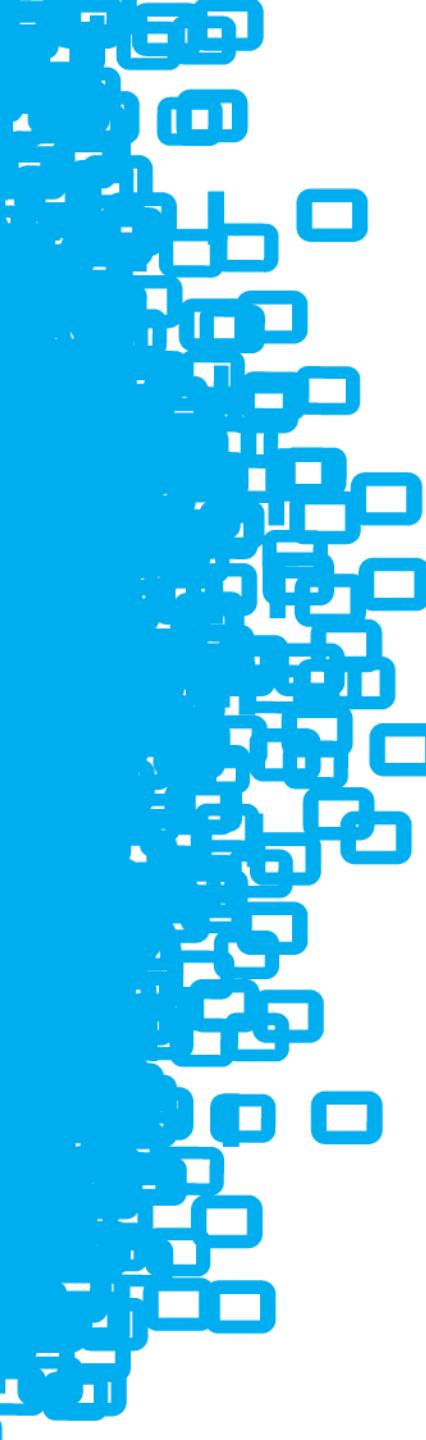
Epicor Support

Rhonda Spah

Director, Support

EPICOR.

Business Inspired™

Agenda
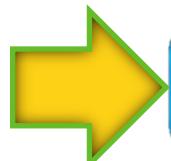
Meet the Team
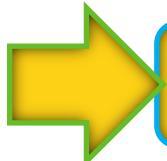
Key Metrics

Communication
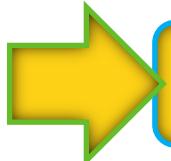
Service Plans

Discussion

EPICOR.
Business Inspired™
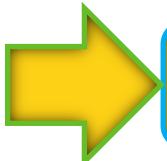
Team

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.
Business Inspired™

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

1 Minneapolis
2 Philadelphia
3 Denver
4 Louisville
5 Hyannis
6 San Diego
7 Monterrey

8 Bracknell
9 Moscow
10 Budapest
11 Kuala Lumpur
12 Sydney
13 Melbourne

EPICOR.
Business Inspired™

Epicor University

Epicor University
PARTNERS EMPLOYEES CUSTOMERS

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
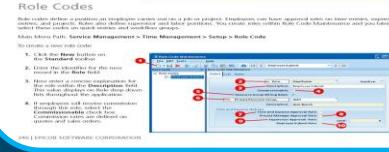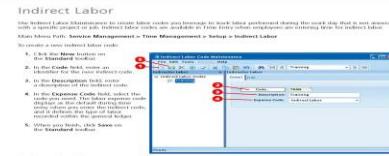
Documentation

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

100+ Americas support representatives Epicor certified

EPICOR.
Business Inspired™
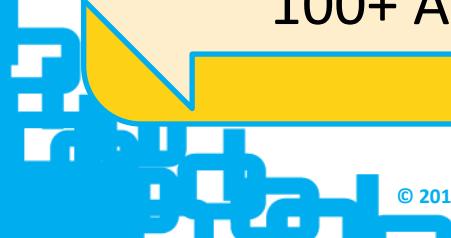
Service Level Commitments

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.
Business Inspired™

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

Deb Desarmeaux	Warren Germscheid	Jane Adams
Manager Application Support	Team Lead – MFG	Engineer - Financial
952-417-5294	952-417-5265	952-417-5215
ddesarmeaux@epicor.com	wgermscheid@epicor.com	jadams@epicor.com

Manufacturing Technical Support

Nathan Anderson	Brad Johnson	Christina Tanttari
Technical Engineer	Technical Engineer	Team Lead - Tech
952-417-5234	952-417-5114	952-417-5110
naanderson@epicor.com	bjohnson@epicor.com	ctanttari@epicor.com

Rhonda Spah	Virginia Johnson
Director, Technical Support Services	Sr. Manager Tech Support
952-417-5120	952-417-5206
rspah@epicor.com	vjohnson@epicor.com

EPICOR.
Business Inspired™

Survey Methodology

Every closed incident

6 questions + comments

Analyst/Manager bonus

Global target is 9.2

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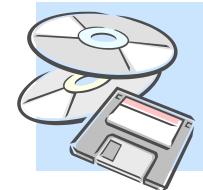
Epicor ERP WW Incident Survey Average
(on a scale of 1-10)

Legend: Average Score, Resolution, Attitude, Knowledge, Communication, Timeframe, Conclusion

EPICOR.
Business Inspired™
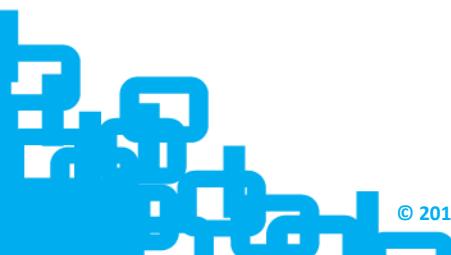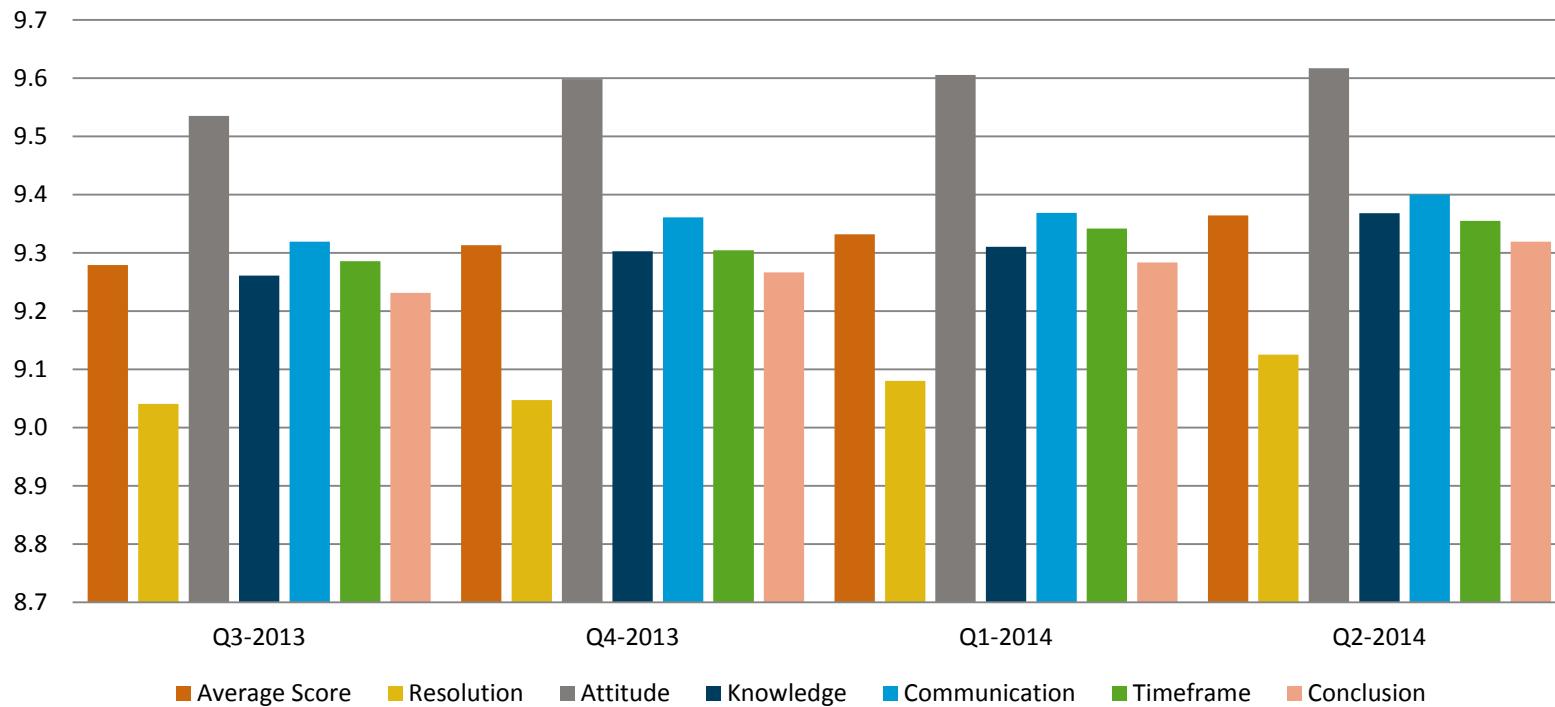
Metrics & Measurement – Current Support Indicators

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

Still open 5%

Closed in more than one week 32%

Closed in one week 18%

Closed in one day 45%
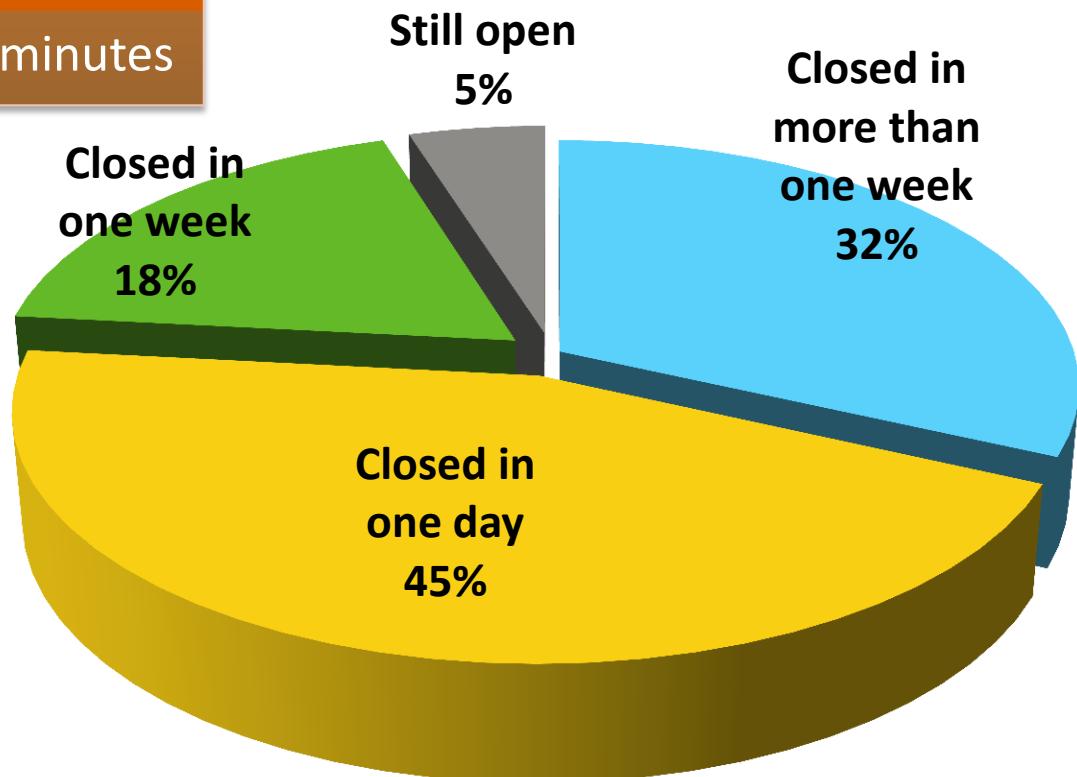
*Source: Epicor Support Call Data Jan-Dec, 2014

EPICOR®
Business Inspired™

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
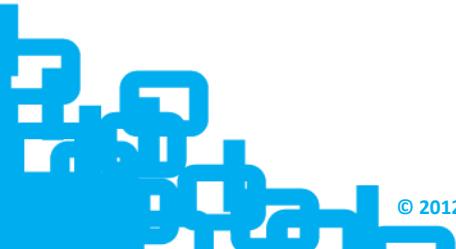
Development Process

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

EPICOR.

Business Inspired™
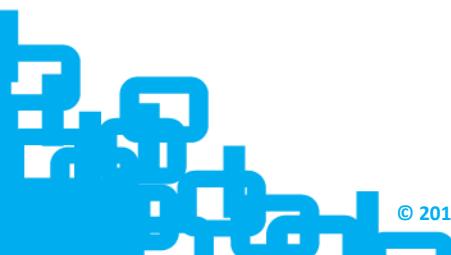
EPICweb

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

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
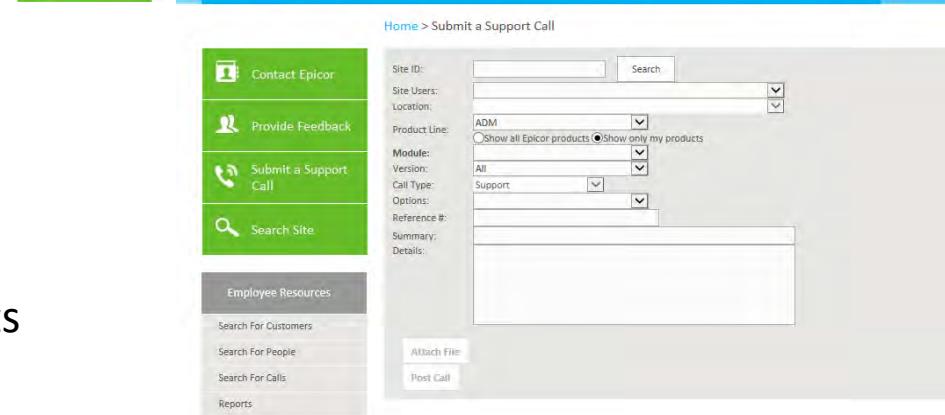
EPICOR.
Business Inspired™

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

EPICOR.
Business Inspired™

Support Newsletter - Quarterly

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

EPICOR.

Business Inspired™

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

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!

EPICOR.

Business Inspired™

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

EPICOR.

Business Inspired™

Questions / Feedback

EPICOR.
Business Inspired™

Thank You!

EPICOR.
Business Inspired™

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

Manufacturing Application Support

Deb Desarmeaux	Warren Germscheid	Jane Adams
Manager Application Support	Team Lead – MFG	Engineer - Financial
952-417-5294	952-417-5265	952-417-5215
ddesarmeaux@epicor.com	wgermscheid@epicor.com	jadams@epicor.com

Manufacturing Technical Support

Nathan Anderson	Brad Johnson	Christina Tanttari
Technical Engineer	Technical Engineer	Team Lead - Tech
952-417-5234	952-417-5114	952-417-5110
naanderson@epicor.com	bjohnson@epicor.com	ctanttari@epicor.com

Rhonda Spah	Virginia Johnson
Director, Technical Support Services	Sr. Manager Tech Support
952-417-5120	952-417-5206
rspah@epicor.com	vjohnson@epicor.com

Manufacturing Third-Party Products and Framework Support

David Litzau	Judy Perry
Team Lead	Team Lead
949-585-2950	949-585-4972
Dlitzau@epicor.com	Jperry@epicor.com

Amy Keusch
Director, Support Tools & Third Party products
949-585-2949
Akeusch@epicor.com

Manufacturing Monterrey Support

Patricia Lerma	Raul Suarez	David Alvarez
Financial Team Lead	Production Team Lead	Technical Team Lead
Plerma@epicor.com	Rsuarez@epicor.com	Dalvarez@epicor.com

Anabell Martinez
Director of Monterrey Support
AMartinez@epicor.com

Enterprise Financial Support

Manuel Lara	Patricia Lerma	Anabell Martinez
Team Lead	Financial Team Lead	Director- Monterrey Support
MLara@epicor.com	PLerma@epicor.com	amartinez@epicor.com

Clientele/ITSM/Installation

Mario Reyes
Support Manager
MReyes@epicor.com

Anabell Martinez
Director of Monterrey Support
AMartinez@epicor.com

Enterprise Distribution, Procurement and Technical Support

Martha Parker
Sr. Manager, America's Support
502-420-2403
Mparker@epicor.com

E4SE Support

Mark Page
Director Support
949-585-2953
Mpage@epicor.com

iScala Support

Clive Washbourne
407-595-1898
cwashbourne@epicor.com

International

Australia/New Zealand

Justin Coombe
Support Manager

JCoombe@epicor.com

Asia

Hong Looi Tan
Support Manager
+60 3 7722 5191
HLTan@epicor.com

CIS

Marina Mareeva
Support Manager
+7 495 799 5666
MMareeva@epicor.com

EMEA Support (Europe, Middle East, and UK)

Tobias Karlsson
Support Manager, Budapest
+36 1 452 7630
TKarlsson@epicor.com

Dianne Tucker
Support Manager, UK
+44 1344 468468
DTucker@epicor.com

Support Executive Management

Joe Jasper
Vice President Americas Support
952-417-5173
JJasper@epicor.com

EPICOR.

Customer Matrix Viewer
Epicor 9

Disclaimer

This document is for informational purposes only and is subject to change without notice. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. However, Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. As each user of Epicor software is likely to be unique in their requirements in the use of such software and their business processes, users of this document are always advised to discuss the content of this document with their Epicor account manager. All information contained herein is subject to change without notice and changes to this document since printing and other important information about the software product are made or published in release notes, and you are urged to obtain the current release notes for the software product. We welcome user comments and reserve the right to revise this publication and/or make improvements or changes to the products or programs described in this publication at any time, without notice. The usage of any Epicor software shall be pursuant to an Epicor end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to Epicor's standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Where any software is expressed to be compliant with local laws or requirements in this document, such compliance is not a warranty and is based solely on Epicor's current understanding of such laws and requirements. All laws and requirements are subject to varying interpretations as well as to change and accordingly Epicor cannot guarantee that the software will be compliant and up to date with such changes. All statements of platform and product compatibility in this document shall be considered individually in relation to the products referred to in the relevant statement, i.e., where any Epicor software is stated to be compatible with one product and also stated to be compatible with another product, it should not be interpreted that such Epicor software is compatible with both of the products running at the same time on the same platform or environment. Additionally platform or product compatibility may require the application of Epicor or third-party updates, patches and/or service packs and Epicor has no responsibility for compatibility issues which may be caused by updates, patches and/or service packs released by third parties after the date of publication of this document. Epicor® is a registered trademark and/or trademark of Epicor Software Corporation in the United States, certain other countries and/or the EU. All other trademarks mentioned are the property of their respective owners. Copyright © Epicor Software Corporation 2011. All rights reserved. No part of this publication may be reproduced in any form without the prior written consent of Epicor Software Corporation.

Revision: May 05, 2011 11:44 a.m.

Total pages: 11

sys.ditaval

Contents

1 Using the Customer Matrix Viewer

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

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:
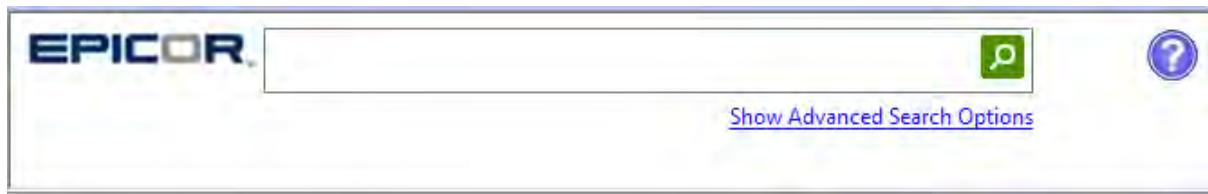
4. When results are displayed, the default is to display ten records per page. If you want to change the default, do the following:

   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

Module Code	Description
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**.

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

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

Module Code	Description
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:
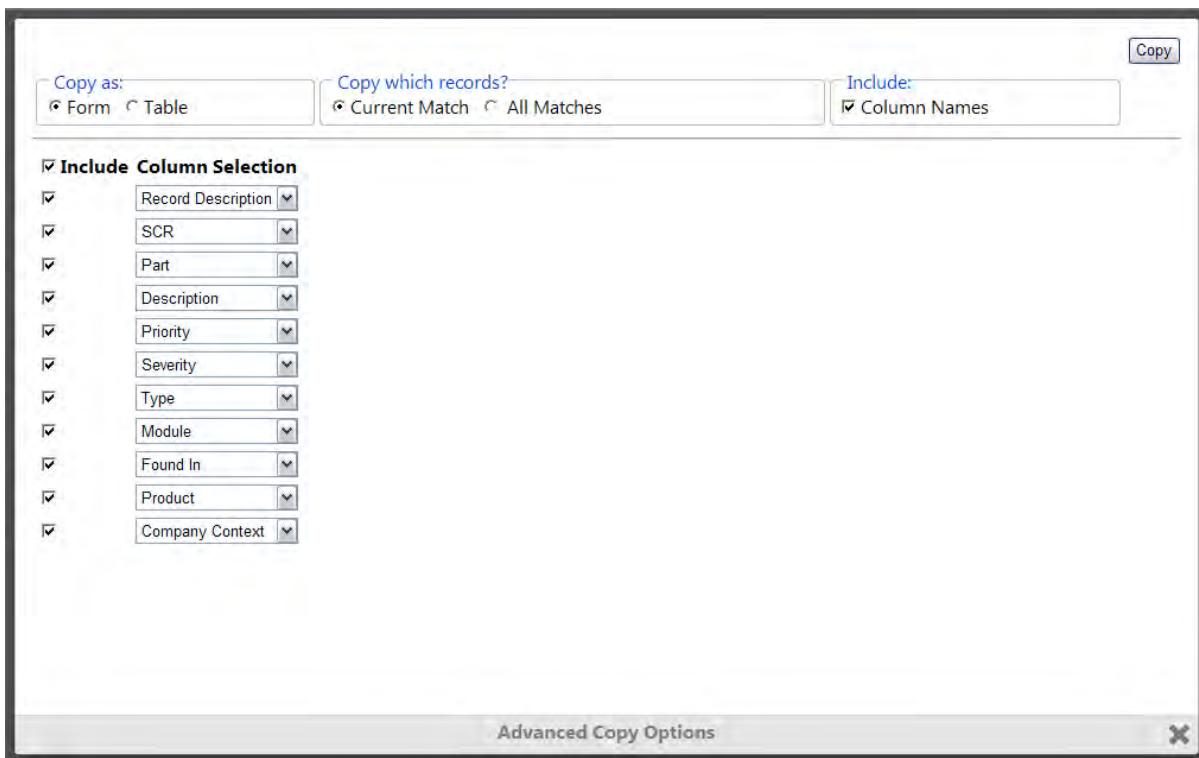
4. Enter your copy selections.

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.