

The Regular quarterly meeting of the Midwest User Group was called to order at 10:02 a.m. on Friday, May 10th at Pilot Pete's Restaurant located in Schaumburg, Illinois. Mark Olbrantz and Calvin Dekker served as moderators for addressing opening business.

Members were reminded to complete the meeting surveys before the end of the day, with special note being made regarding the request for topics. Reminders were given in terms of the November XX meeting which will be the final for the year and noted that the Dues invoices will be forwarded in November.

The meeting moved right into Open Mic Discussion, beginning with a list of questions that had been emailed prior to the meeting:

Version 8 can make a method of manufacturing that has an operation in one plant and another operation in a different plant. In V 9, need to have different MOMs for each. An enhancement request has been placed to change 9 to work similarly to the V8 process. Presently two companies are on the list for requesting this. Suggestion was made to attend the Wisconsin User Group as several member companies are multi-plant. Additionally, posting to the YahooGroups were offered as an option for increasing the interest in signing the petition.

Keep track of Material Certs in Vista? If doing lot tracking, on entry can link document in receipt entry. One company has a manual process that requires the share sequence that requires the material cert. They can material track to trace back, but don't have an automated way to get that to the customer. (Physically type the number in on the Shear line, can't complete the sequence without the PO in).

Paper Document Management. Using doclink. A third party product. Automates sending out purchase orders, etc. Has a nice database repository for looking up any documents. There are also upscale versions of the tool which will go beyond being a repository tool to a more interactive tool. APM and APM Plus are base products, can get into full document workflow. Can go as far as optical character recognition – relate special location of data to identify action. Company doing a series of webinars one/week for the next several weeks that will highlight products. Another version, is a manual process. Put a scanned document into a shared folder and attach to the job in Vantage. A third company using the Epicor standard document manager. Scan to pdf, store on network and link. Another member referenced the Coda Bears document auto email program.

Acknowledge to customer what specified materials were used in the job. One company has that set as part of inspection report at excel level and email to customer. Using APM plus will allow for some automated processing of the package. APM allows to set up by customer or part number. Essentially a BPM. Can specify in APM or the PPM. Now getting some standard forms

Anyone using inspection plans, setting up dimensions to check, etc? Built on the configurator. Concerns over the investment in time to define the inspection plan per part. Can copy an inspection plan.

Hardware in a virtual environment. Using VMWare. As far as configuration, did you use Epicor or set up their own? One company purchased software in 2010, to date still don't have invoices coming from the system. Getting 500 orders in was taking over 8 hours through service connect. Past few months have been working with Epicor to get this resolved. Not seeing the attention they needed. Two dedicated blade servers 384 G Ram 24 hard drives on RAID 10 configuration. Ruled out hardware as being the issue. After that determination, have made some strides with doing some things with service connect, using other

processes. Now with a one-off fix they're seeing significant impact but not what they need to be happening from Epicor.

Conversation moved into EDI question for orders. One of the things they're learning is they're not finding customers that are importing as many orders a day as they are (8000+). Mark indicated he's been to 5 Insights and hadn't heard of any customers doing that volume. Possibility of Fusion IO drives – but not certain they would work as well in the virtual environment. Have concluded to this point that software architecture has the biggest impact.

Given the volume they have – with same ship process they have to make sure processing times have to accommodate the schedule constraints. Several members shared information in order to pursue further discussion related to the speed issue.

Calvin Dekker provided a brief demonstration of the Epicor (9) Diagnostic Tool – which also works on 8. Lets the user know where some of the bottlenecks for the organization. After a brief install there are four main aspects which the tool will assess: Client, Server, Network and Config. The summary and details are presented. The file from the diagnostic tool can be exported to excel which can be sent/shared with the Epicor Technical support if needed and they can develop a plan from that information. The diagnostic information can include details regarding run times, or even list the processes and identify what isn't running properly. Encouraged to run through weekly. A copy of the presentation has been appended to the meeting minutes

Question whether the tool works on configurator. You'll see it on the update method. It won't tell what in the code failed, but will identify if not running properly.

Question regarding the YahooGroups was made. For interested parties, the group is available at <http://tech.groups.yahoo.com/group/vantage/?v=1&t=search&ch=web&pub=groups&sec=group&slk=1> The process to join simply entails contacting the administrator by clicking the join button and following instructions.

Mark Olbrantz led a discussion and provided an update from the Insights event in June. The basis of this update included:

Explained that he tends to focus his time on the ½ day sessions and then the technical seminars to gain access to some of the people with whom he might normally be able to talk.

Some brief information provided regarding V10 with a quick demo, but not as much as he had hoped for.

One comment was made that the new CEO seemed to have a more customer centric focused demeanor. Liked the customer advocates that were created. If not getting an answer from Technical Support or CAM, go to the advocate.

The feedback definitely in favor of the early sessions. They're expensive (\$250) but worth the investment both in topics covered and instructor direct contact.

Next year – back to Vegas. Mandalay Bay.

Hall of Solutions – were able to set up appointments to get technical solutions. Vendors, Epicor partners, Label printers, bar code printers, etc.

Meet your ERP Team.

Concept draw - can set project roadmap

The Insights discussion transitioned to Topic ideas for the November meeting:

*Upgrade discussion would be helpful (to 9). Conversion, DMT, etc.
IT Project Management – expanding projects after defined, etc.
MES*

Following a break for lunch and a raffle drawing for the floral arrangements the meeting reconvened with a presentation on barcoding by Karen Schoenung, from Fisher Barton. A copy of the presentation has been appended to the minutes.

Karen provided a brief background on Fisher Barton Group and then an explanation of the process moving from Crystal Reports DataWorks Bar 39 font for printing labels into the bartender. Additionally, Karen covered a comparison of Crystal Reports to Bartender, some of the Bartender Software licensing information and several hints garnered from experience.

The final presentation for the afternoon was made by Patty Loessberg of Avalara for a presentation on Market Use Sales Tax. A copy of the presentation has been appended to the minutes. Avalara manages a website that provides current information: www.salestaxchanges.com Patty provided a brief review of how the AvaTax program works after highlighting the multitudinous tax regulations in place, with more forthcoming.

The meeting concluded at 3:07 p.m.

The next regular scheduled VMUG quarterly meeting is Friday, November 15th. Topics for presentation may be provided at any point via the VMUG website: <http://vantageusers.org/Contact.aspx>. A formal call for topics will be sent to membership in October.

Epicor 9 Diagnostic Tool

Prepared by
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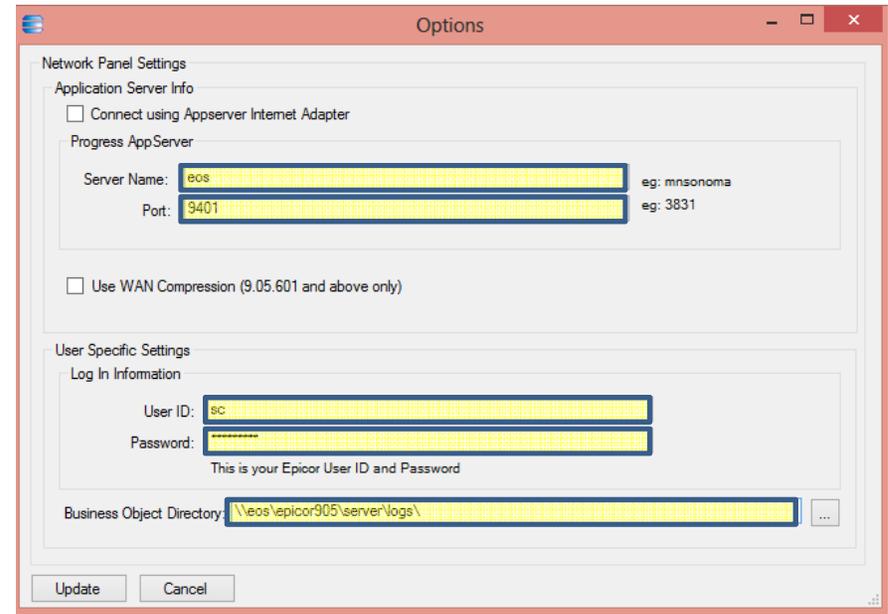
for

Vantage Midwest User Group

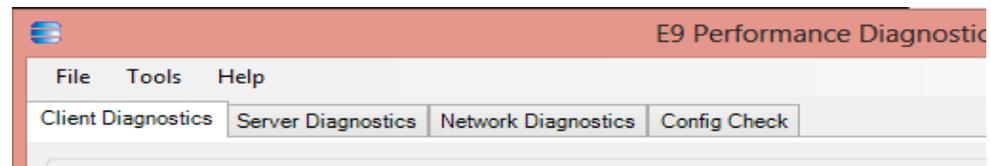
August 16, 2013 Meeting

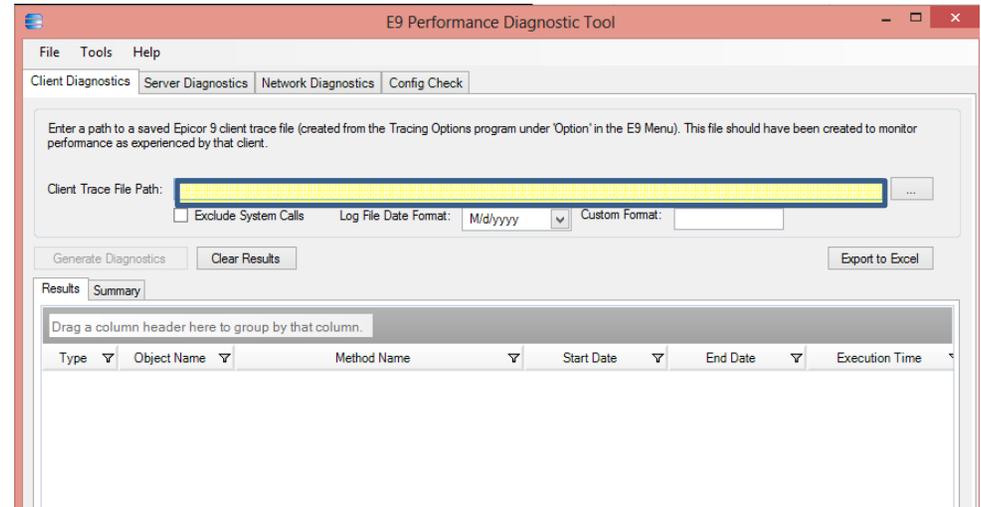
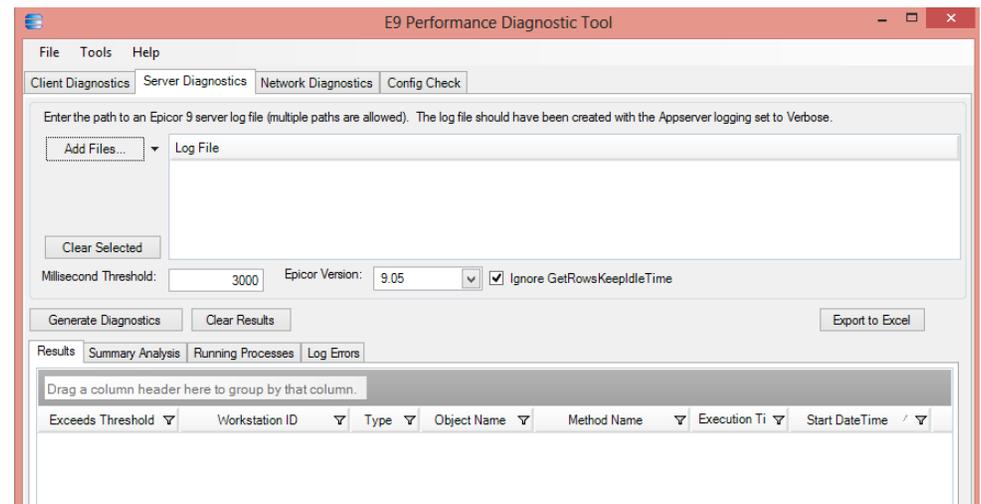
- © **It's Free and can be downloaded from Epicweb.**
- © **Performs diagnostic checks on**
 - The Client
 - The Server
 - The Log Files
 - The Network

☉ **After installing the software update the Options from the Tool menu**

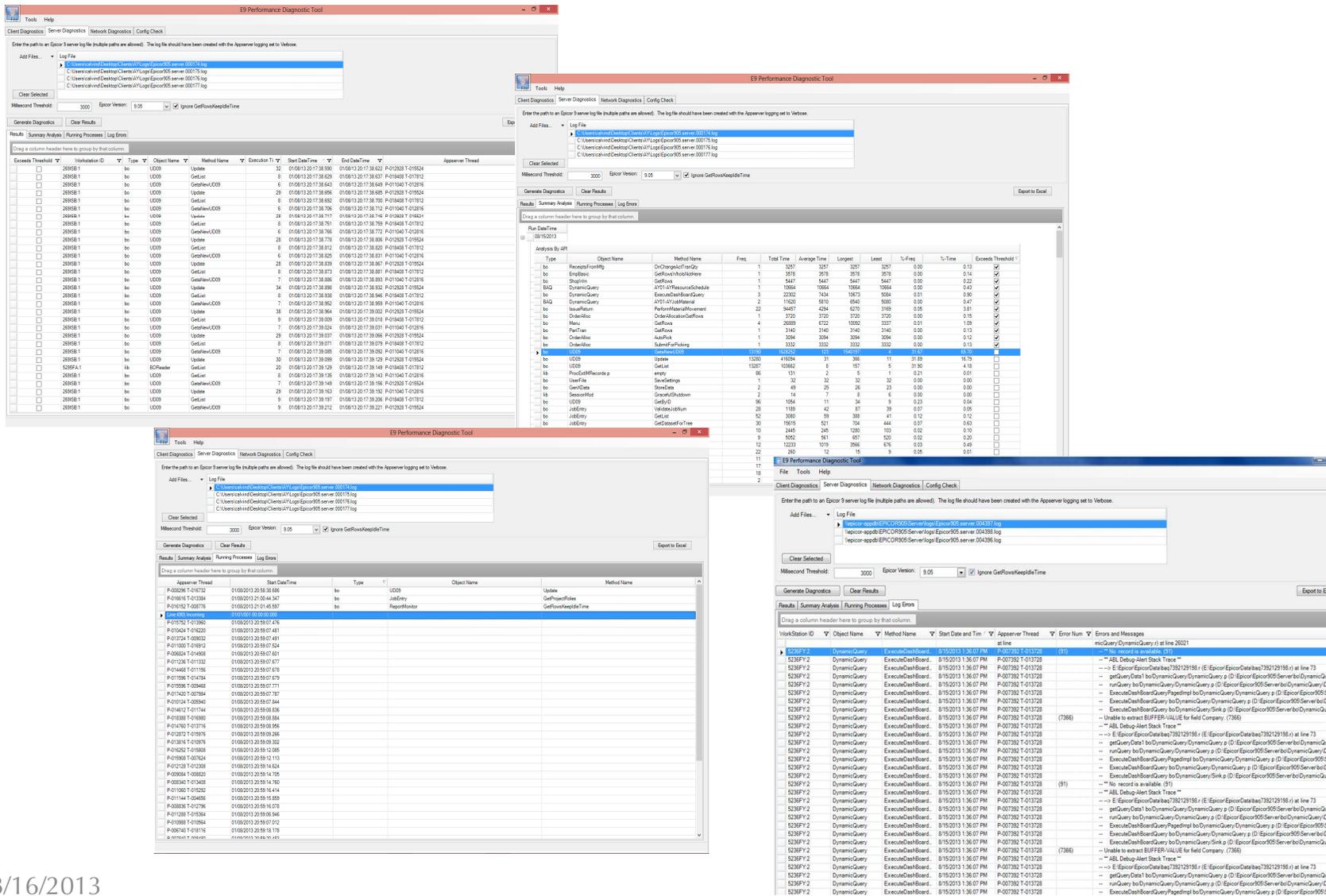


☉ **The diagnostic tool is separated by four segments**



 **Client Diagnostics** **Server Diagnostics**

Server Diagnostics Tabs



The screenshot displays the E9 Performance Diagnostic Tool interface, which is used for monitoring and troubleshooting server performance. The interface is divided into several sections:

- Client Diagnostics:** Shows the path to the E9 server log file, which is located at `C:\Users\local\Desktop\Clients\AT\Log\E9Server\server.000177.log`.
- Network Diagnostics:** Displays a table of network-related events, including object names, methods, and execution times.
- Summary Analysis:** Provides a high-level overview of the system's performance, including metrics like CPU usage, memory usage, and disk I/O.
- Running Processes:** Lists the processes currently running on the server, along with their names, PIDs, and parent PIDs.
- Log Errors:** Shows any errors that have occurred during the diagnostic process.

The main data table in the Network Diagnostics tab is as follows:

Exceeds Threshold	Violation ID	Type	Object Name	Method Name	Execution T	Start Date/Time	End Date/Time	Apperance Thresh
	2959B1	bo	UDOP	Update	32	01/08/13 20:17:38:030	01/08/13 20:17:38:022	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:029	01/08/13 20:17:38:027	P-01948 T-017812
	2959B1	bo	UDOP	GetList	6	01/08/13 20:17:38:043	01/08/13 20:17:38:049	P-01100 T-01236
	2959B1	bo	UDOP	Update	28	01/08/13 20:17:38:056	01/08/13 20:17:38:055	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:032	01/08/13 20:17:38:700	P-01948 T-017812
	2959B1	bo	UDOP	GetList	6	01/08/13 20:17:38:706	01/08/13 20:17:38:712	P-01100 T-01236
	2959B1	bo	UDOP	Update	16	01/08/13 20:17:38:717	01/08/13 20:17:38:746	P-01948 T-017812
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:751	01/08/13 20:17:38:759	P-01948 T-017812
	2959B1	bo	UDOP	GetList	6	01/08/13 20:17:38:756	01/08/13 20:17:38:772	P-01100 T-01236
	2959B1	bo	UDOP	Update	28	01/08/13 20:17:38:778	01/08/13 20:17:38:806	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:812	01/08/13 20:17:38:820	P-01948 T-017812
	2959B1	bo	UDOP	GetList	6	01/08/13 20:17:38:825	01/08/13 20:17:38:831	P-01100 T-01236
	2959B1	bo	UDOP	Update	28	01/08/13 20:17:38:829	01/08/13 20:17:38:867	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:873	01/08/13 20:17:38:881	P-01948 T-017812
	2959B1	bo	UDOP	GetList	7	01/08/13 20:17:38:886	01/08/13 20:17:38:891	P-01100 T-01236
	2959B1	bo	UDOP	Update	14	01/08/13 20:17:38:898	01/08/13 20:17:38:932	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:938	01/08/13 20:17:38:946	P-01948 T-017812
	2959B1	bo	UDOP	GetList	7	01/08/13 20:17:38:962	01/08/13 20:17:38:969	P-01100 T-01236
	2959B1	bo	UDOP	Update	28	01/08/13 20:17:38:964	01/08/13 20:17:38:992	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:999	01/08/13 20:17:38:016	P-01948 T-017812
	2959B1	bo	UDOP	GetList	7	01/08/13 20:17:38:024	01/08/13 20:17:38:031	P-01100 T-01236
	2959B1	bo	UDOP	Update	29	01/08/13 20:17:38:037	01/08/13 20:17:38:066	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:071	01/08/13 20:17:38:079	P-01948 T-017812
	2959B1	bo	UDOP	GetList	7	01/08/13 20:17:38:085	01/08/13 20:17:38:092	P-01100 T-01236
	2959B1	bo	UDOP	Update	30	01/08/13 20:17:38:099	01/08/13 20:17:38:129	P-02020 T-03524
	2959B1	bo	UDOP	GetList	20	01/08/13 20:17:38:129	01/08/13 20:17:38:148	P-01948 T-017812
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:136	01/08/13 20:17:38:143	P-01100 T-01236
	2959B1	bo	UDOP	GetList	7	01/08/13 20:17:38:149	01/08/13 20:17:38:156	P-02020 T-03524
	2959B1	bo	UDOP	Update	28	01/08/13 20:17:38:162	01/08/13 20:17:38:192	P-02020 T-03524
	2959B1	bo	UDOP	GetList	8	01/08/13 20:17:38:197	01/08/13 20:17:38:206	P-01948 T-017812
	2959B1	bo	UDOP	GetList	9	01/08/13 20:17:38:212	01/08/13 20:17:38:221	P-02020 T-03524

The Summary Analysis tab shows the following data:

Type	Object Name	Method Name	Freq	Total Time	Average Time	Longest	Least	%/Freq	%/Time	Exceeds Threshold
bo	Processors	GetCurrentUsage	1	135	135	135	135	0.0	0.1	0
bo	Engines	GetView/View/View	1	3518	3518	3518	3518	0.0	0.14	0
bo	Shapers	GetView	1	847	847	847	847	0.0	0.22	0
BOG	DynamicQuery	API/View/ResourceSchedule	1	10654	10654	10654	10654	0.0	0.43	0
BOG	DynamicQuery	Execute/DatabaseQuery	3	22302	7434	10673	3004	0.0	0.90	0
BOG	DynamicQuery	API/View/ResourceSchedule	2	11620	5810	6542	5000	0.0	0.47	0
bo	Instance	Performance/Performance	22	9407	428	6270	2100	0.0	3.81	0
bo	Database	Check/Database/Database	1	3726	3726	3726	3726	0.0	0.5	0
bo	Menu	GetView	4	26659	6722	10002	3337	0.0	1.09	0
bo	Platform	GetView	1	3142	3142	3142	3142	0.0	0.13	0
bo	App/Exec	App/Exec	1	3034	3034	3034	3034	0.0	0.12	0
bo	Core/Exec	App/Exec/Exec	1	3102	3102	3102	3102	0.0	0.13	0
bo	UDOP	Update	1320	41604	31	365	11	31.8	16.9	0
bo	UDOP	GetList	1307	10962	8	87	5	39.86	4.58	0
bo	Processors	GetCurrentUsage	86	131	2	5	1	0.01	0.01	0
bo	View/Exec	View/Exec	1	52	52	52	52	0.0	0.01	0
bo	Get/Exec	Get/Exec	2	49	25	26	23	0.0	0.00	0
bo	Security	Get/Exec	1	2	2	2	2	0.0	0.00	0
bo	Get/Exec	Get/Exec	96	104	1	34	9	0.13	0.04	0
bo	Instance	GetCurrentUsage	28	1489	42	67	39	0.07	0.05	0
bo	Instance	GetCurrentUsage	82	3659	99	368	44	1.2	0.12	0
bo	Instance	GetCurrentUsage	30	1915	321	704	446	0.07	0.63	0
bo	Instance	GetCurrentUsage	10	244	24	103	102	0.0	0.10	0
bo	Instance	GetCurrentUsage	9	852	91	687	520	0.02	0.20	0
bo	Instance	GetCurrentUsage	12	1223	1019	396	476	0.03	0.48	0
bo	Instance	GetCurrentUsage	22	260	12	15	9	0.05	0.01	0

The Running Processes tab shows the following data:

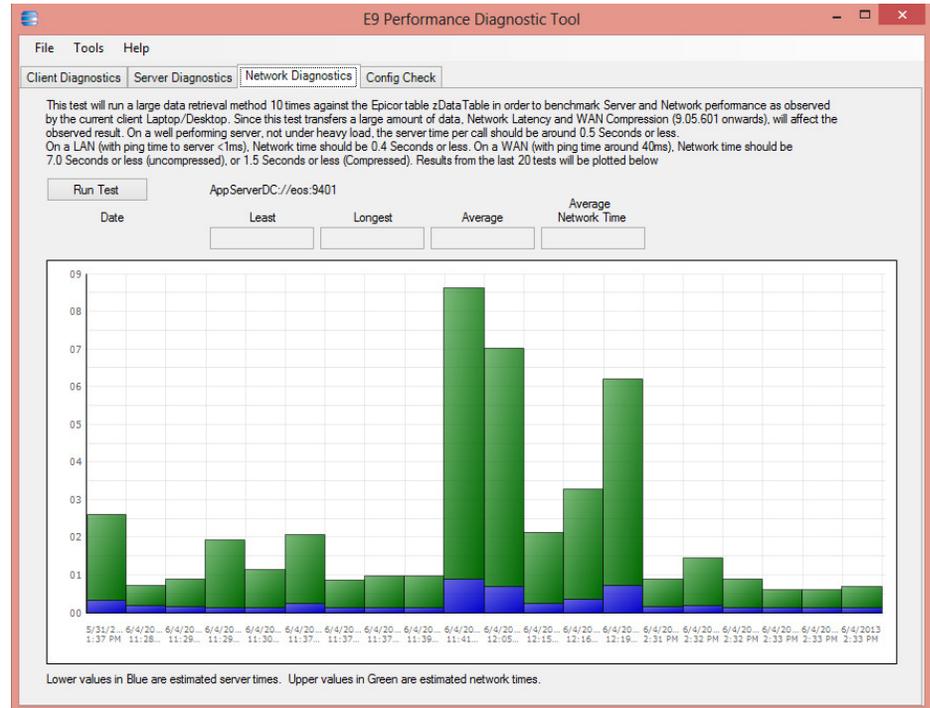
Apperance Thresh	Start Date/Time	Type	Object Name	Method Name
P-02020 T-01712	01/08/2013 20:16:38:686	no	UDOP	Update
P-01948 T-01236	01/08/2013 21:04:44:547	no	Jedometry	GetView/View/View
P-02020 T-03524	01/08/2013 21:04:46:887	no	ReportServer	GetView/View/View

The Log Errors tab shows the following data:

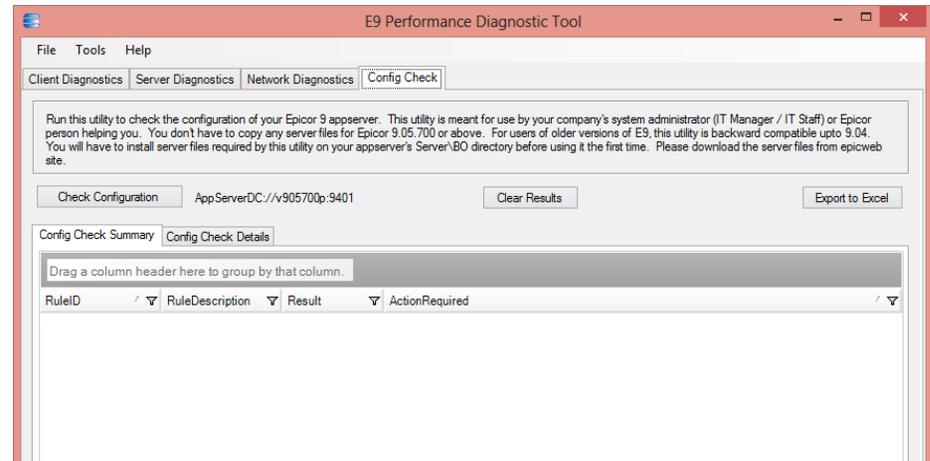
Violation ID	Object Name	Method Name	Start Date/Time	Apperance Thresh	Error Num	Errors and Messages
523F2/2	DynamicQuery	Execute/DatabaseQuery	8/15/2013 1:36:07 PM	P-02020 T-03524	(81)	Unable to extract BUFFER VALUE for field Company (736)
523F2/2	DynamicQuery	Execute/DatabaseQuery	8/15/2013 1:36:07 PM	P-02020 T-03524	(81)	Unable to extract BUFFER VALUE for field Company (736)
523F2/2	DynamicQuery	Execute/DatabaseQuery	8/15/2013 1:36:07 PM	P-02020 T-03524	(81)	Unable to extract BUFFER VALUE for field Company (736)



Network Diagnostic



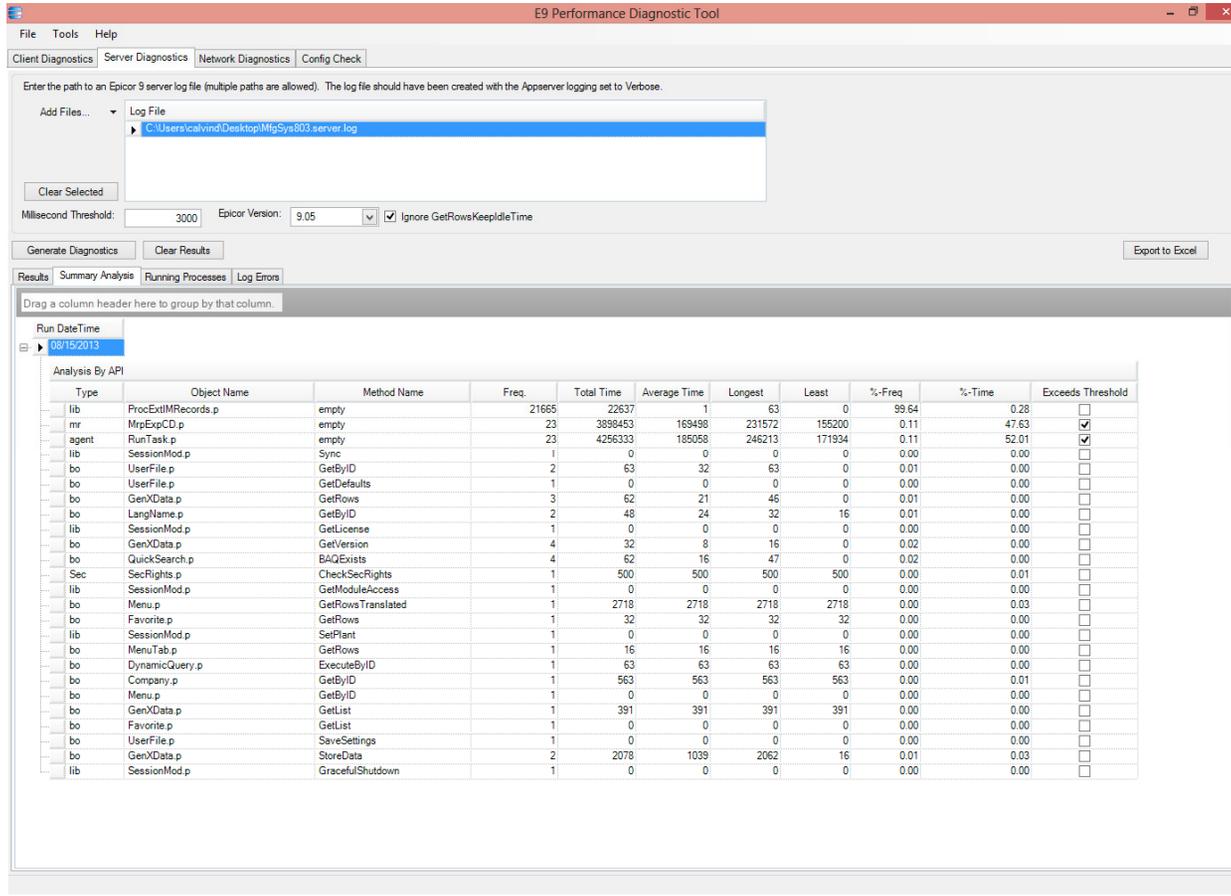

Configuration Check



The screenshot shows the 'Config Check' tab of the E9 Performance Diagnostic Tool. It includes a 'Check Configuration' button and a server path 'AppServerDC://v905700p:9401'. Below this is a table with columns for RuleID, RuleDescription, Result, and ActionRequired. The table is currently empty, and there is a prompt to 'Drag a column header here to group by that column.'

Run this utility to check the configuration of your Epicor 9 appserver. This utility is meant for use by your company's system administrator (IT Manager / IT Staff) or Epicor person helping you. You don't have to copy any server files for Epicor 9.05.700 or above. For users of older versions of E9, this utility is backward compatible upto 9.04. You will have to install server files required by this utility on your appserver's Server\BO directory before using it the first time. Please download the server files from epicweb site.

Also works with Vantage / Vista 8



The screenshot shows the E9 Performance Diagnostic Tool interface. The 'Add Files...' dialog is open, showing a selected log file: 'C:\Users\calvind\Desktop\MfgSys803 server log'. Below the dialog, the 'Millisecond Threshold' is set to 3000, 'Epicor Version' is 9.05, and the 'Ignore GetRowsKeepIdleTime' checkbox is checked. The 'Generate Diagnostics' button is visible.

The 'Results' section shows a table titled 'Analysis By API' for the run date '08/15/2013'. The table has the following columns: Type, Object Name, Method Name, Freq., Total Time, Average Time, Longest, Least, %-Freq, %-Time, and Exceeds Threshold. The 'Exceeds Threshold' column contains checkboxes, with the 'RunTask.p' method checked.

Type	Object Name	Method Name	Freq.	Total Time	Average Time	Longest	Least	%-Freq	%-Time	Exceeds Threshold
lib	ProcExtIMRecords.p	empty	21665	22637	1	63	0	99.64	0.28	<input type="checkbox"/>
mr	MipExpCD.p	empty	23	3898453	169498	231572	155200	0.11	47.63	<input checked="" type="checkbox"/>
agent	RunTask.p	empty	23	4256333	185058	246213	171934	0.11	52.01	<input checked="" type="checkbox"/>
lib	SessionMod.p	Sync	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	UserFile.p	GetByID	2	63	32	63	0	0.01	0.00	<input type="checkbox"/>
bo	UserFile.p	GetDefaults	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	GenXData.p	GetRows	3	62	21	46	0	0.01	0.00	<input type="checkbox"/>
bo	LangName.p	GetByID	2	48	24	32	16	0.01	0.00	<input type="checkbox"/>
lib	SessionMod.p	GetLicense	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	GenXData.p	GetVersion	4	32	8	16	0	0.02	0.00	<input type="checkbox"/>
bo	QuickSearch.p	BAQExists	4	62	16	47	0	0.02	0.00	<input type="checkbox"/>
Sec	SecRights.p	CheckSecRights	1	500	500	500	500	0.00	0.01	<input type="checkbox"/>
lib	SessionMod.p	GetModuleAccess	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	Menu.p	GetRowsTranslated	1	2718	2718	2718	2718	0.00	0.03	<input type="checkbox"/>
bo	Favorite.p	GetRows	1	32	32	32	32	0.00	0.00	<input type="checkbox"/>
lib	SessionMod.p	SetPlant	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	MenuTab.p	GetRows	1	16	16	16	16	0.00	0.00	<input type="checkbox"/>
bo	DynamicQuery.p	ExecuteByID	1	63	63	63	63	0.00	0.00	<input type="checkbox"/>
bo	Company.p	GetByID	1	563	563	563	563	0.00	0.01	<input type="checkbox"/>
bo	Menu.p	GetByID	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	GenXData.p	GetList	1	391	391	391	391	0.00	0.00	<input type="checkbox"/>
bo	Favorite.p	GetList	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	UserFile.p	SaveSettings	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>
bo	GenXData.p	StoreData	2	2078	1039	2062	16	0.01	0.03	<input type="checkbox"/>
lib	SessionMod.p	GracefulShutdown	1	0	0	0	0	0.00	0.00	<input type="checkbox"/>



Barcoding Software

Presented by Karen Schoenung at VMUG meeting on 08/16/2013

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About The Fisher Barton Group

World-Leading Manufacturer of Superior Components

Divisions

- THE SPIRIT SPRAY TECHNOLOGIES INC.**
- fisher-barton specialty products inc**
- ZENITH CUTTER**
- fisher-barton south carolina inc**
- Accurate Specialties Inc**
- fisher-barton denver inc**
- LINKAGE SOLUTIONS**
- Lund Precision Products Ireland**

Industry Leaders in Materials Engineering

The Fisher-Barton Group delivers performance-enhancing, innovative products to our customers through industry-leading, cost-effective manufacturing processes. Our capabilities have expanded beyond simple metal stamping and fabrication to include a broad range of manufacturing services to fit your unique needs. With start-to-finish expertise and technology at each of our divisions, we are your one-stop solution for customized manufacturing.

As the corporate parent of eight independent global subsidiaries based in Wisconsin, South Carolina, Illinois, Texas, Vietnam and Ireland, we are an active Midwest-based, privately-owned holding company that brings nearly 40 years of experience with materials and processes to every customer interaction. **Acquisitions** are a key component of strategy to expand the range of manufacturing solutions we can offer our customers.



News

- [Accurate Specialties visit from 3D Assembly District Representative Kasperiga](#)
(July 26, 2012)
- [Fisher-Barton Group Acquires Lund Precision Products](#)
(June 19, 2012)
- [Accurate Specialties adds MAG 2900 VTC](#)
(June 1, 2012)
- [Fisher-Barton opens new materials research lab](#)
(August 2, 2011)
- [Fisher-Barton Group Acquires Zenith Cutter Co.](#)
(June 17, 2011)

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My Barcoding Background Information

- Started using barcoding in 2012.
- Visited other companies to see how they used barcoding.
- Started with Crystal Reports.
- Moved on to using Bartender software.
- Tried a couple of the Epicor “canned” report data definitions.
- Worked on some customized labels using vb.net to talk to the Bartender software.

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What is Barcoding?

Partial definition from Wikipedia:

A barcode is an optical machine-readable representation of data relating to the object to which it is attached. Originally barcodes systematically represented data by varying the widths and spacings of parallel lines, and may be referred to as linear or one-dimensional (1D). Later they evolved into rectangles, dots, hexagons and other geometric patterns in two dimensions (2D). Although 2D systems use a variety of symbols, they are generally referred to as barcodes as well. Barcodes originally were scanned by special optical scanners called barcode readers. Later, scanners and interpretive software became available on devices including desktop printers and smartphones.

From myself:

Printed data and related codes to scan into software using special barcoding fonts.

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The Crystal Reports Option

- Crystal Developer on five terminal servers.
 - Version XI R2.
 - Crystal Software was setup by someone else on each server.
- DataWorks Bar 39 font used (free).
 - Issues with numeric formats (decimals especially).
 - Issues with spaces and other characters.
- Still using for some labels.
 - Why fix if it ain't broken – many more fish to fry.
 - More familiar with the formulas for some of the complicated calculations.

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The Bartender Option

- Bartender software setup on our file print server.
 - Automation Edition (30 printers), Version 10.0 SR2.
 - Setup by our local IT network person.
- Two sub folders setup in epicor\mfgsysdata.
 - Bartender – holds .dat files for Epicor RDDs.
 - Btender – holds .csv files and .btw files for vb.net option.
- A folder on each terminal server in client803\client.
 - Bartender – this holds the dlls needed for vb.net option (copied from SDK\Assemblies on software pc to five terminal servers).
- Printing does not go through System Monitor.
- You can set a specific printer or allow the user to choose a printer.

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Crystal vs Bartender

- Fonts.
 - One barcode font in Crystal, many in Bartender.
 - Sizing and spacing is easier in Bartender.
 - One data item can show both the human readable and the barcode in Bartender, in Crystal you need to have two data items formatted with two different fonts.
- Printing.
 - Crystal and Bartender RDDs go through System Monitor.
 - Bartender called from VB.Net does not go through System Monitor.
 - Intermittently lost print settings for Crystal, once they were setup correctly for Bartender, we did not lose them going forward.

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The Bartender Software

- Bartender software – design tool for the format and layout of labels. We can connect to it from the five terminal servers.
- Commander – a task scheduler used for processing .bt files and rename to .dat files. This is needed for the RDDs that Epicor Uses.
- License Server – to view and prioritize printers that you will use to print out labels or other barcodes from Bartender.
- History Explorer – not setup on our server yet, need to learn more about this portion of the software.
- Reprint Console - not setup on our server yet, need to learn more about this portion of the software.

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The Epicor Report Data Definitions

- Out of the box in Vantage 8.03.409C.
 - SalesLabel = GenSO.
 - RMALabel = GenQA.
 - ReceiptLabel = GenRcpt.
 - JobLabel = GenJob.
 - InventoryLabel = GenInv.
 - CartonSingelPart = GenShip.
- More labels in Epicor 9.
- Most of these were not useful to Fisher Barton.
- One we tried to use did not work (created duplicates).

*****Attachment "GenBartenderOutOfBox.docx" *****

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Some Customized Labels (using VB.Net)

- Job Receipt to Inventory labels.
- Reprint labels with typed or scanned in data – visual part exits verification.
- Bottle Label for return material is 1 X 4 to cover only bottom portion of original label.
- Issue Material label – in progress.
- PO Receipt Label – a version for one division, two similar versions for another division.
- Miscellaneous Shipment Label.
- Production Tag – from MES end activity.

*****Attachment "VBNetBartenderLabels.docx" *****

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Some Customized Labels (using Excel)

- Miscellaneous Locations – often used locations for putting away inventory.
- Rack locations – to attach to racks in the factory.

*** Attachment "ExcelBartenderLabels.docx" ***



Some Problems We Found

- If more than one user needs to print the same label type at the same time, extra custom code and setup is required.
- **bt.Stop()**
- Printer connection issues – same label prints on one printer, but not on another printer.



Testing, Testing, Testing!!!

- Develop in your Test environment first and make sure you get the expected results.
- Currently, we have the path for the btw file and csv files in one location (for both Test and Live). This will work OK as long as you have the VB.Net code only in TEST until you are ready to deploy in LIVE.
- Try to cover all expected scenarios.
- Test on the printers the user will be printing on.
- If your VB.Net code has errors, break it apart for troubleshooting.

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Tips and Tricks

- Set literal values to help troubleshoot.
- Include messages in your VB.Net code to see where it may be failing.
- Use a textbox to view the data you need to include – as a temporary item to make sure you have the value needed.
- Print to a cute pdf printer for testing, then to the actual label printer.

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Additional Helpful Tools

- Bartender software help.
- Use Vantage developer options, BAQs or SQL to find the fields you need to add to your label/report.
- Training videos for Bartender –
<http://www.bartenderbarcodesoftware.com/label-software/barcode-label-software-training-videos.aspx> .
- Technical support for Bartender -
<http://www.bartenderbarcodesoftware.com/label-software/technical-support.aspx>
- Vantage Yahoo Group _ useful for VB.Net custom code -
<http://tech.groups.yahoo.com/group/vantage/?v=1&t=search&ch=web&pub=groups&sec=group&slk=1>

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The VB.Net Code

- Add a custom button.
- Add an “on click” event through the event wizard.
- Add the actual custom code, testing along the way.
- Add dlls (BoReader, BLConnectionPool, Seagull Print Engine).
- Add Imports (Epicor.Mfg.Lib, System.IO, System.Text).
- Combine screen data and input data using a UD form or BAQ Report Form (customized).
- Add your new menu item, customize the menu item and hook the customization to the menu item.

*****Attachment “VBNetCodeLabels.docx” *****

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The Bartender Label Setup

- Copy a previously created label or create a new label.
- Use your new customization in Epicor to output a CSV file to get the actual data to connect to your new label.
- Connect your CSV file using the Database Connection Setup in the Bartender Software.
- Preview in the Bartender Software and save your file.
- Test using your custom buttons in Epicor to see the full results, including actually printing your label.

08/16/2013

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How do you plan to use Barcoding? Questions?

Presented by Karen Schoenung (kschoenung@fisher-barton.com)
at VMUG meeting on 08/16/2013

11/09/2012

18

Epicor Sales Tag

Order Number

OrderHed_OrderNum



Ship To

Customer_Name
ShipToNum_Address1
ShipToNum_Address2
ShipToNum_Address3
ShipToNum_City
ShipToNum_State

Part Number

OrdDtl_PartNum



Field: GenSO.Link_OrderDtl_PartNum_PartDescription

Line Number

999



Order Date

OrderHed_OrderDate

Need By Date

OrderHed_NeedByDate

Ship Via

OrderHed_ShipViaCode_Description

Quantity

OrderDtl_OrderQty

Price

OrderDtl_ListPrice

Epicor RMA Tag

RMA Number

Field: RMAHead_RMA Num



Customer Name

Field: Link_RMAHead_Customer_Name
Field: Link_RMAHead_Customer_Address1
Field: Link_RMAHead_Customer_Address2
Field: Link_RMAHead_Customer_City
Field: Link_RMAHead_Customer_State
Field: Link_RMAHead_Customer_Zip

Detail

Field: PartTran_PartNum



Field: GenQA.PartTran_PartDescription

9999



Epicor PO Receipt Tag

Part Number

RcvDtl PartNum



Lot

RcvDtl LotNum



PO Number

RcvDtl PONum



Receipt QTY

99999



Supplier

<SupplierID>
<Supplier Name>
<Purchase Point>
<PP Name>

Packing Slip

RcvHead_PackSlip

Receipt Date

RcvHead_ReceiptDate

Epicor Job Tag

Job Number

Field: JobHead JobNum



Material

Field: JobMtl PartNum



Operation

Field: JobOper OprSeq



Field: GenJob.JobOper_OpCode

Field: GenJob.JobOper_OpDesc

QTY

9999



Epicor Inventory Tag

Part Number

Field: Part PartNum



Lot

Field: Link PartLot LotNum



QTY

9999



EPICOR
18200 VonKarman Ave.
Suite 1000
Irvine, CA 92612 USA

TO:

Field: Link_Customer_Name
Field: Link_ShipToNum_Address1
Field: Link_ShipToNum_Address2
Field: Link_ShipToNum_Address3
Field: Link_ShipToNum_City
Field: Link_ShipToNum_State
Field: Link_ShipToNum_ZIP

CUSTOMER P.O.

Field: Link OrderNum PONum



PART NO

Field: ShipDtl PartNum



Field: Link_PartNum_PartDescription

LOT NO

Field: ShipDtl LotNum



Qty

Field: DspLineShpQty



Job Receipt to Inventory:

123456789123456



Lot #:

12345678



Job #:

12345678



Qty:

1234



Inspected By:

Weight:

23456

User ID: 07/31/2013

Sample Text Longer 03:19:46 PM

Reprint Label:

123456789123456



Lot #:

12345678



Job #:

12345678



Qty:

1234



Inspected By:

Weight:

23456

User ID: 07/31/2013

Sample Text Longer 03:20:48 PM

Bottle Label:

Quantity LB

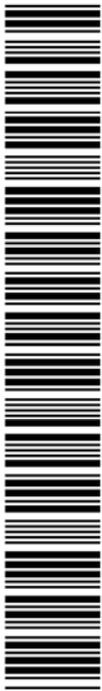
10.32



Issue Material Label – In progress:



Sample Text



123456789123456

PCS Pkg Wt56.0000lbs WY P
1234 Made in 21 Y FM912
United States

CNH ORIGINAL PARTS

PO Receipt Label (TST – ver1):

TST PO: 61124 1 1
Tag'd By: dhoop
Bottle ID: 04

Date: 5/17/2012
Supplier ID: SAIGOB
LOT #: 11081106



MSV-065

Dock-To-Stock

Desc: DTS1 - Chrome Oxide Powder, Cr2O3

Rev: D



Quantity: LB

Receipt Tag: 1 of 2

150.0



PO Receipt Label (TST – ver2):

TST PO: 61124 1 1
Tag'd By: dhoop
Bottle ID: 04

Date: 5/17/2012
Supplier ID: SAIGOB
LOT #: 11081106



MSV-065

Dock-To-Stock

Desc: DTS1 - Chrome Oxide Powder, Cr2O3

Rev: D



Quantity: LB

Receipt Tag: 1 of 2

150.0



PO Receipt Label (FBSP):

RcvDtl_PartNum



<Description>

Lot/Heat

RcvDtl_LotNum



PO Number

RcvDtl_PONum



Receipt QTY

99999



Receipt Date

RcvHead_ReceiptDate

User ID: <User>

Date/Time: 07/31/2013 03:24 PM

Supplier

<SupplierID>
<Supplier Name>
<Purchase Point>
<PP Name>

Packing Slip

RcvHead_PackSlip

Job# _ _ _ _ _ Lot# _ _ _ _ _

Miscellaneous Shipment Label:

123456789123456



Lot #:

12345678



Qty:

1234



User ID: 07/31/2013

Sample Text Longer 03:30:32 PM



THERMAL SPRAY TECHNOLOGIES PRODUCTION
515 Progress Way
SUN PRAIRIE, WI 53590

Sample Text 123

Desc: Sample Text

Rev: Sample

Job#:

12345678



Sample Text Longer

TST SO: 1234

Date/Time: 07/31/2013 03:32 PM

Cust ID: Sample

Operator: Sample

Cust PO: Sample Text

Notes: Sample Text

Cust Part: Sample Text

Resource: ResourceID

Last Operation: LastOper

Next Operation: NextOper

Quantity: Sample

12345678



Miscellaneous Location Label:

 FGSHP
 WEIGH UP
 NCM
 SCRAP

Rack Location Label:



9D1



VB.NET code on customized Issue Material Form

Comments in green

Key statements/values in yellow highlight

Imports Infragistics.Win.UltraWinGrid

'I use an ultragrid dynamic query to get the current week and year.

Private Sub **btnPrintLbl_Click**(ByVal Sender As Object, ByVal Args As System.EventArgs) Handles btnPrintLbl.Click

'// ** Place Event Handling Code Here **

oTrans.pushstatustext("Retrieving Data ...", TRUE)

Dim dynQryAD As DynamicQueryAdapter = New DynamicQueryAdapter(oTrans.EpiBaseForm)

Dim baqID as String = **"FBSP-InspCalWeek"**

Dim pcAndOr As String = **"AND"**

Dim pcTable As String = ""

Dim pcField As String = ""

Dim pcValue As String = ""

Dim pbIsConst as Boolean = True

Dim pbNeg as Boolean = False

Dim pbSucceed as Boolean = False

Dim pcLeftParentheses as String = ""

Dim pcRightParentheses as String = ""

Dim pcCondition as String = **">="**

Dim pcToTable as String = String.Empty

Dim pcToField as String = String.Empty

pcTable = **"ProdCalWeek"**

pcField = **"WorkDate"**

pcValue = **today.AddDays(-6)**

dynQryAD.BOconnect()

dynQryAD.GetByID(baqID)

dynQryAD.AddWhereItem(dynQryAD.QueryDesignData, baqID, pcTable, pcField, pcCondition, pbIsConst, pcValue, pcToTable, pcToField, pcLeftParentheses, pcRightParentheses, pcAndOr, pbNeg)
dynQryAD.Update

pcTable = **"ProdCalWeek"**

pcField = **"WorkDate"**

pcValue = **today**

ry

: query



```
dynQryAD.AddWhereItem(dynQryAD.QueryDesignData, baqID, pcTable, pcField, "<=", pbIsConst,
pcValue, pcToTable, pcToField, pcLeftParentheses, pcRightParentheses, pcAndOr, pbNeg)
dynQryAD.Update
```

```
'//copy all data from QueryDesignData tables to DynamicQueryData tables (only for tables that exist
in both datasets)
```

```
Dim targetRow as DataRow
For each table as DataTable in dynQryAD.DynamicQueryData.Tables
If Table.Rows.Count = 0 Then
For Each sourceRow as DataRow in dynQryAD.QueryDesignData.Tables(table.ToString()).Rows
targetRow = table.NewRow()
targetRow.ItemArray = sourceRow.ItemArray
table.Rows.Add(targetRow)
Next
End If
Next
```

```
dynQryAD.Execute(dynQryAD.DynamicQueryData)
```

```
ugdEpiCustom1.DataSource = dynQryAd.QueryResults
```

```
'//setup column headers
```

```
ugdEpiCustom1.DisplayLayout.Bands(0).Columns("ProdCalWeek.WeekNum").Header.Caption = "Week Number"
ugdEpiCustom1.DisplayLayout.Bands(0).Columns("ProdCalWeek.WeekYear").Header.Caption = "Week Year"
ugdEpiCustom1.DisplayLayout.Bands(0).Columns("ProdCalWeek.WorkDate").Header.Caption = "Work Date"
ugdEpiCustom1.DisplayLayout.Bands(0).Columns("ProdCalWeek.CalendarID").Header.Caption = "Calendar ID"
ugdEpiCustom1.DisplayLayout.Bands(0).Columns("ProdCalWeek.Company").Header.Caption = "Company"
```

```
dynQryAD.Dispose
otrans.pushstatustext("Ready", FALSE)
```

```
'otrans.Update() - leave this statement in uncommented if you want to update the transaction without
clicking the OK button.
```

```
End Sub
```

```
Private Sub ugdEpiCustom1_AfterRowActivate(ByVal Sender As Object, ByVal Args As System.EventArgs)
Handles ugdEpiCustom1.AfterRowActivate
```

```
'// ** Place Event Handling Code Here **
```

```
Dim activeRow As UltraGridRow = ugdEpiCustom1.ActiveRow
Dim user as String = IssueMaterialForm.Session.UserID
```

```

Dim edvIM As EpiDataView = CType(oTrans.EpiDataViews("IM"), EpiDataView)
Dim edvPart As EpiDataView = CType(oTrans.EpiDataViews("cPart"), EpiDataView)
Dim lfo As LaunchFormOptions = new LaunchFormOptions()
lfo.ValueIn = "FBSP-Constlss"
Dim BAQForm As UIReflector = ProcessCaller.LaunchCallbackForm(otrans, "UDlssMtl", lfo)
Dim ParamView As EpiDataView = CType(BAQForm.UITrans.EpiDataViews("ReportParam"), EpiDataView)
ParamView.dataView(ParamView.Row).BeginEdit()
ParamView.dataView(ParamView.Row)("Character01") = edvIM.dataView(edvIM.Row)("Company")
ParamView.dataView(ParamView.Row)("Character02") = user
ParamView.dataView(ParamView.Row)("Character03") = edvIM.dataView(edvIM.Row)("ToAssemblyPartNum")
ParamView.dataView(ParamView.Row)("Character04") = edvIM.dataView(edvIM.Row)("ToAssemblyPartDesc")
ParamView.dataView(ParamView.Row)("Number01") = edvPart.dataView(edvPart.Row)("NetWeight")
ParamView.dataView(ParamView.Row)("Number02") = ugdEpiCustom1.ActiveRow.Cells(2).Value.ToString
ParamView.dataView(ParamView.Row)("Number03") = ugdEpiCustom1.ActiveRow.Cells(3).Value.ToString
ParamView.dataView(ParamView.Row).EndEdit()

End Sub
End Module

```

VB.NET code on customized UDlssMtl Form

```

Imports Epicor.Mfg.Lib
Imports System.IO
Imports System.Text

```

```

Private Sub btnPrtLbl_Click(ByVal Sender As Object, ByVal Args As System.EventArgs) Handles
btnPrtLbl.Click
    '// ** Place Event Handling Code Here **
    Dim edvParam As EpiDataView = CType(oTrans.EpiDataViews("ReportParam"), EpiDataView)
    Dim User as string = edvParam.dataView(edvParam.Row)("Character02")
    if edvParam.Row >=0 AndAlso edvParam.dataView(edvParam.Row)("Character03") > "" Then
    Dim _bor As BOREader = new BOREader(oTrans.Session.ConnectionPool)
    Dim ds AS DataSet = _bor.GetRows("SysAgent", "", "ClientFileRootDir")
    if ds.Tables(0).Rows.Count>0 Then
    Dim ExportLine as String = ""
        'Dim sw As StreamWriter = New StreamWriter(ds.Tables(0).Rows(0)("ClientFileRootDir") &
"\Reports\" & oTrans.Session.UserID & "\\\" & oTrans.Session.SessionID)
        'Dim myPath as String = ds.Tables(0).Rows(0)("ClientFileRootDir").ToString() & "\Reports\" &
User & "\"
        Dim myPath2 as String = ds.Tables(0).Rows(0)("ClientFileRootDir").ToString() & "\BTender\"

```

```
'hard coded path for TESTING
'myPath = "\\EpicSQL\Epicor\MfgSysData\Reports\" & User & "\"
myPath2 = "\\EpicSQL\Epicor\MfgSysData\BTender\"
```

```
Dim myFile as String = myPath2 & "FBSP4by3IssMtlUser.csv"
```

```
Using sw As StreamWriter = New StreamWriter(myFile)
ExportLine = String.Format("{0}{1}{0},{0}{2}{0},{0}{3}{0},{0}{4}{0},{0}{5}{0},{0}{6}{0},{0}{7}{0},{0}{8}{0},{0}{9}{0}",
CHR(34), "Company", "User", "Part", "PartDesc", "MadeIn", "Weight", "Qty", "Labels", "WeekNum")
    sw.WriteLine(ExportLine)
```

```
ExportLine = String.Format("{0}{1}{0},{0}{2}{0},{0}{3}{0},{0}{4}{0},{0}{5}{0},{0}{6}{0},{0}{7}{0},{0}{8}{0},{0}{9}{0}",
CHR(34), edvParam.dataView(edvParam.Row)("Character01"),
edvParam.dataView(edvParam.Row)("Character02"),edvParam.dataView(edvParam.Row)("Character03"),
edvParam.dataView(edvParam.Row)("Character04"), txtEpiCustom1.value,
edvParam.dataView(edvParam.Row)("Number01"), nedQty.Value, nedLabels.Value,
edvParam.dataView(edvParam.Row)("Number02"))
    sw.WriteLine(ExportLine)
End Using
```

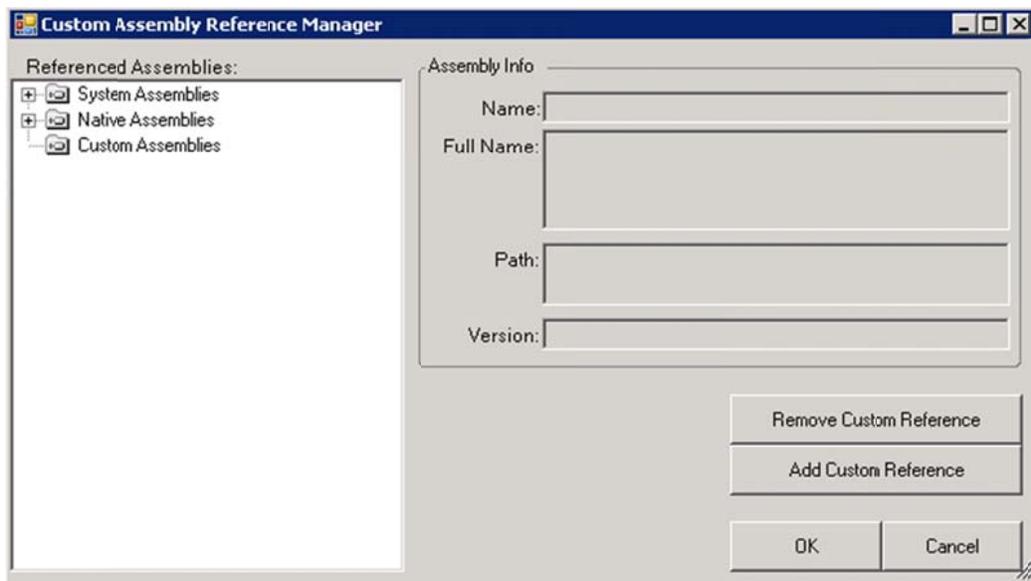
TRY

```
Dim bt as New Seagull.BarTender.Print.Engine
bt.Start()
Dim FullLabelName as String = myPath2 & "\BTW\FBSP\FBSP-IssueMaterialLabel" & ".btw"
Dim If as Seagull.BarTender.Print.LabelFormatDocument
If = bt.Documents.Open(FullLabelName)
Dim myPrinter as String
oTrans.PushStatusText("Printing", true)
Dim PrintDialog1 as New PrintDialog
Dim result As DialogResult = PrintDialog1.ShowDialog()
'If the result is OK then print the document.
If (result = DialogResult.OK) Then
    myPrinter = printDialog1.PrinterSettings.PrinterName
```

ELSE

```
    EXIT SUB
End If
If.PrintSetup.PrinterName = myprinter
""\sn-it-ts-02\CutePDF Writer"
If.PrintSetup.IdenticalCopiesOfLabel = nedLabels.Value
bt.ActiveDocument.PrintSetup.ReloadTextDatabaseFields = True
If.Print("4x3 Issue Material Label")
```

```
oTrans.PushStatusText("Done", true)
bt.Stop()
Catch ex as Exception
    MessageBox.show("Error printing label: ")
End Try
Cursor.Current = System.Windows.Forms.Cursors.Default
End If
End If
End Sub
End Module
```



In customization mode, click tools, Assembly Reference Manager – to add your custom dlls.



The Sales Tax Landscape is Shifting: Are you Ready?

Patty Loessberg,
Channel Development Manager
June 2013
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Avalara Making sales tax less taxing.

What We Will Discuss Today

- ▶ **Current Sales Tax Environment**
- ▶ **Marketplace Fairness Act of 2013**
- ▶ **Challenges of Sales Tax Compliance**
- ▶ **Questions**



Avalara

Current Tax Climate

The Status of Our States

- Sales tax = **State revenue**
- States are still recovering from the recession
- States are always trying to increase revenue

What Does This Mean to Businesses?

You are a revenue collector for the state. And the state would like its money *now*, thank you. 😊

Sales tax = **Source of risk**



Avalara

Current Tax Climate

General Sales & Use Taxes Represent One Third of all Tax Revenues to State Coffers

- ▶ **States Are Hiring Auditors and Equipping them with Better Tools**
 - Idaho Hired 48 Auditors in 2012
 - CA Hiring 100 Auditors over next 3 years specifically targeting remote sellers
- ▶ **States are Passing Laws to Redefine Nexus**
 - Affiliate Nexus
 - Economic Nexus
- ▶ **States are Passing Laws to Redefine Services and Digital Content as Taxable**
- ▶ **There are Bills before Congress to enact Remote Nexus Laws and Tax Internet Sales Everywhere**



Avalara

Marketplace Fairness Act of 2013

- ▶ Allow states to require out-of-state businesses to collect sales tax.
- ▶ Destination based collection in all cases.

On May 6, 2013 the Senate passed the Marketplace Fairness Act of 2013 by a vote of 69 to 27...
The bill now goes to the House.



Avalara

What Would Passage of Marketplace Fairness Act Do...

- ▶ Grants authority to states to require a remote retailer to collect sales tax
- ▶ Significantly changes nexus for sales tax purposes
- ▶ Includes a \$ threshold to require compliance



Avalara

Not just for online/internet sales...

- ▶ MFA applies to anyone who makes remote sales, regardless of how they make remote sales and regardless of whether those sales are taxable
- ▶ Think catalog sales, think travelling sales people, phone and fax orders

Remote seller =
Any out-of-state business entity that sells into a state in which that seller "... would not legally be required to pay, collect, or remit state or local sales and use taxes unless provided by this Act."



Avalara

Nexus would still exist, but...

- ▶ Current Constitutional Nexus Analysis does not vanish.
- ▶ Vendors with less than \$1,000,000 in remote sales will still work in the nexus universe.
- ▶ All existing nexus twists and turns carry forward, including click through nexus.



Avalara

Get the latest news...

www.salestaxchanges.com



Marketplace Fairness Act of 2013



Avalara

Challenges of Sales Tax Compliance

- ▶ **Product Taxability Rules are not consistent.**
- ▶ **Sheer volume of separate jurisdictions.**
- ▶ **Variable and ever-changing rates.**
- ▶ **ZIP Code based calculations are only accurate some of the time.**



Avalara

Take Aways

- ▶ **Current Sales Tax Environment**
- ▶ **Marketplace Fairness Act of 2013**
- ▶ **Challenges of Sales Tax Compliance**
- ▶ **Avalara Value Proposition**
- ▶ **Questions**



Avalara

Automation *IS* the answer!

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 9, Vantage, Vista, Enterprise, Prophet 21, and Prelude)
- ▶ Avalara provides a leading sales tax management solution
- ▶ Most sophisticated jurisdictional determination capability in the industry
- ▶ Largest Streamlined Sales Tax Certified Service Provider
- ▶ Backed by many years of tax expertise



Avalara

Epicor Tax Connect Product Capabilities

Epicor Tax Connect Elements of End-to-End sales tax Compliance

Completely auto



SEAMLESS INTEGRATION TO ERP, E-COMMERCE AND THIRD PARTY APPLICATIONS

Epicor Tax Connect Product Capabilities

Epicor Tax Connect Elements of End-to-End sales tax Compliance

Completely automated, end-to-end

SEAMLESS INTEGRATION TO ERP, E-COMMERCE AND THIRD PARTY APPLICATIONS

Key Benefits of automation

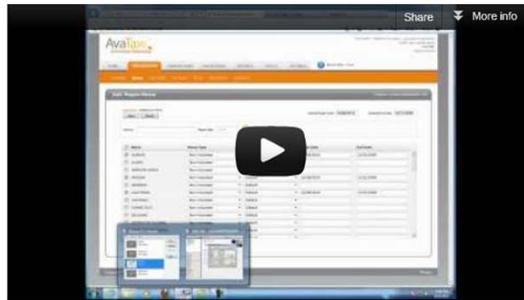
Sales tax automation helps your business **save time**

- increase accuracy
- mitigate risk
- gain efficiency
- increase profitability

Avalara

Online Product Demos

www.avalara.com/resources/product-demos



Avalara



www.avalara.com
206.826.4900 ext. 6032
949.533.7853 mobile
patty.loessberg@avalara.com

Questions?



Tax Connect

Tax Connect

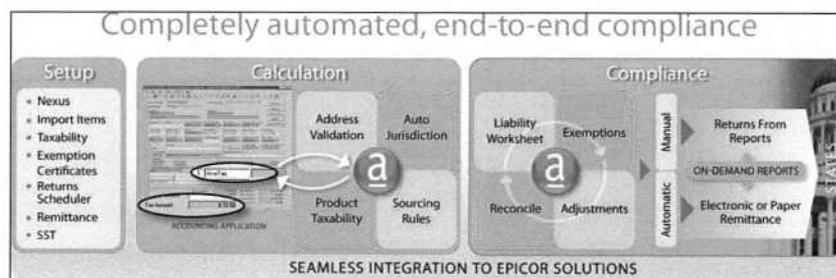
Epicor Tax Connect is a fast, easy, accurate, and affordable way to calculate and file sales and use tax.

Managing sales and use tax is a government-required, compulsory activity. Any time or money spent on tax compliance is, by nature, non-profitable. There are more than 14,500 United States and Canadian tax jurisdictions and the rates, rules, and boundaries change relentlessly. Keeping up with that is an operational distraction and a drag on the efficiency of your organization. Fortunately there is a simple, affordable, and accurate solution that relieves the accounting department of this risk and burden.

Epicor Tax Connect takes the hassle and the worries out of sales and use tax compliance.

Epicor Tax Connect is a sales and use tax management service that eliminates the tedious work and complexity of calculating, collecting, reporting, and remitting taxes in multiple jurisdictions. Tax Connect simplifies all of these processes. With integration to your Epicor solution*, it performs USPS CASS-certified validation, sales and use tax jurisdiction determination, and rate calculation on-the-fly with no change to your existing workflow. Fully detailed reports are always at your fingertips, and returns are easily populated and generated.

Epicor Tax Connect is powered by Avalara® AvaTax®. Epicor selected AvaTax because it is the leading on-demand sales and use tax management solution, it has the most sophisticated jurisdictional determination capability in the industry, and is backed by tax expertise of Avalara.



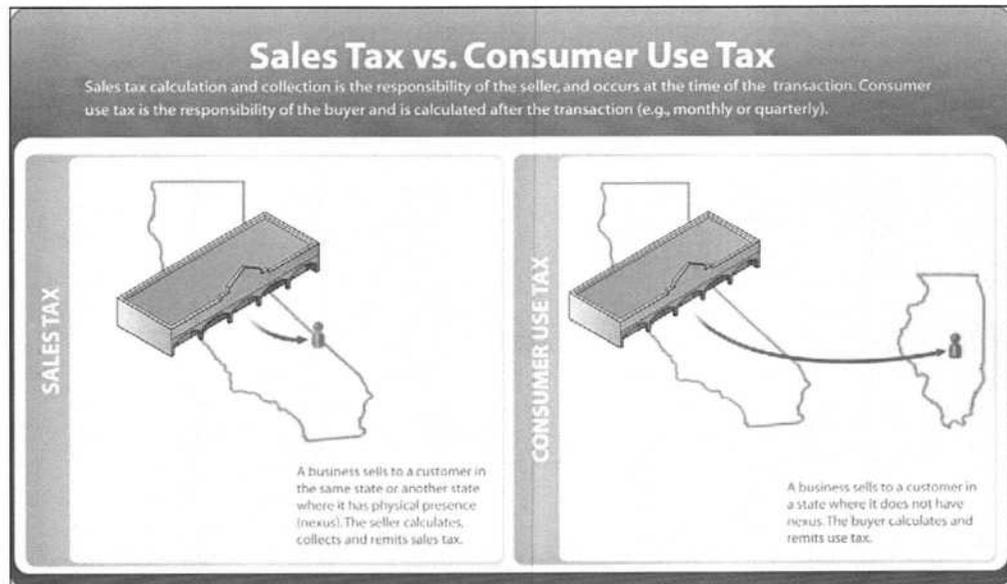
About Epicor

Epicor is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality, and services industries. Founded in 1984, Epicor serves 20,000 customers in more than 150 countries, providing solutions in over 30 languages.

EPICOR.

What is sales tax compared to use tax?

Sales Tax is defined as a consumption tax charged at the point of purchase for certain goods and services. Use tax is a tax imposed by a state to compensate for the sales tax lost when an item is purchased outside of the state, but is used within the state. Both sales and use tax do not drive revenue nor reduce expenses. They are tricky problems that are generally poorly understood—much less managed—by many businesses. Companies that ignore the issues or manage it inefficiently do so at their own peril. Managing consumer use tax can be as time-consuming, costly, and complicated as managing sales tax. Most accounting solutions and ERPs cannot support consumer use tax management. Epicor Tax Connect provides a single, simple solution for both sales and use tax.



Some of the industries and business activities that may make compliance more difficult are:

Elevated Risk Industries

- Contract services
- Manufacturing
- Hospitality
- Distribution
- Service and repair
- Medical and dental

Elevated Risk Activities

- Multiple business locations
- Remote sales force
- Registered business in more than one state
- Provides product samples
- Consumes saleable products

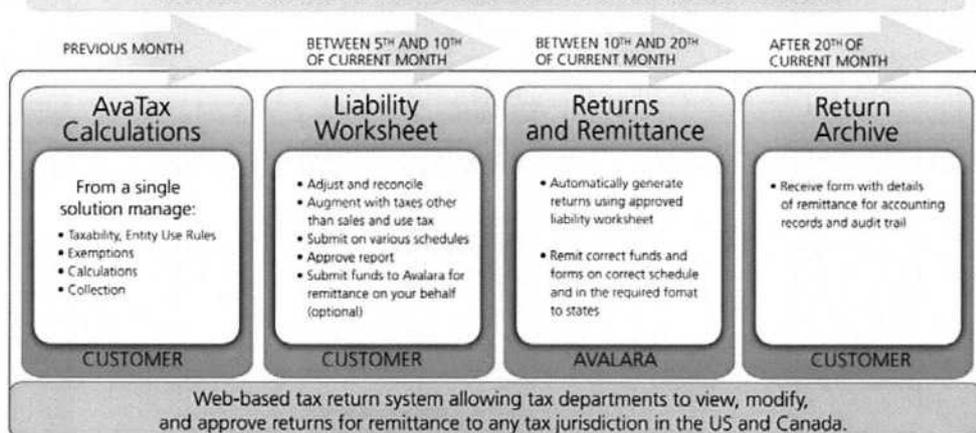
Full tax returns service - minimize the time your tax department spends on preparing and filing tax returns.

One of the most labor-intensive and tedious parts of sales and use tax management is populating and filing tax returns. The data can be hard to collect and hard to separate by tax jurisdiction. Epicor Tax Connect Returns saves time with return filings, cutting costs and reducing errors.

- Reconcile liability: Reconcile your liability worksheet for all states and jurisdictions to drive filing and remittance
- One time set-up: Set-up all returns and file just once
- Use a single solution: File multiple returns for multiple tax regions for varying times from one console
- Make one payment: Transfer a single amount to a secure bank account and Avalara will distribute the funds to all the jurisdictions where you have liability (optional)
- Manage deductions and exemptions: Record deductions and exemptions on forms by effortlessly gathering data already recorded in the AvaTax® Dashboard
- Approve for submission: Approve sales tax liability for all jurisdictions in which you have nexus and let Avalara e-file or mail checks on your behalf (optional)
- On-demand solution: The AvaTax Dashboard is Web-hosted so you can work remotely from anywhere through a browser

Epicor Tax Connect Returns

Full Return and Remittance Process available from the AvaTax Dashboard



Take advantage of Epicor Tax Connect Returns to achieve end-to-end compliance through accurate sales and use tax calculation, easily-accessed liability worksheets for each jurisdiction and returns submitted on your behalf by Avalara (optional).



*Epicor Tax Connect is compatible with Epicor 9, Vantage, Enterprise, and Retail solutions.

You won't believe how easy sales and use tax compliance can become.

Epicor Tax Connect provides direct real-time integration* to the AvaTax solution, providing a truly seamless user experience.

The AvaTax Dashboard is the backbone for your tax automation system. Within this secure portal, a company can manage its complete tax profile, including definition of taxability rules, control of nexus status, setting of exemptions, and administration of tax filings and remittance. Additional tax calculation tools and account settings can be accessed through the Dashboard as well.

The Dashboard is also a powerful report generator, providing users with robust, dynamic reports instantly. Analyze transaction details all the way down to line item tax information, including jurisdiction-specific data. Run reports to assist with manual tax filing or make adjustments in a reconciliation report prior to automated returns preparation and remittance. The Dashboard even provides exporting options for further data processing and management.

Tax Connect simply gets your sales and use tax functions done automatically, with no change to your existing workflow—from rate research and maintenance to reporting and returns—automatically, instantly, and accurately.

	Enterprise	Epicor 9	Retail	Vantage
Sales Tax	✓	✓	✓	✓
Use Tax	✓	✓	✓	Planned

Start managing sales and use taxes the smart and easy way with Epicor Tax Connect!

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SUCCESS STORY – Walton Signage



Walton Signage Relies on Epicor Tax Connect to Automate and Calculate Taxes



Company Facts

- Location: San Antonio, Texas
- Industry: Manufacturers of Corporate Signage
- Number of Employees: 140
- Web site: www.waltonsignage.com



Success Highlights

Challenges and Opportunities

- Walton Signage needed a reliable and affordable way to automate and calculate sales and use taxes
- Epicor Tax Connect solved a huge business problem for Walton Signage as the accounting department spent 10 to 12 hours a week on tax code research

Epicor Solution and Services

- Powered by Avalara® AvaTax®, Epicor Tax Connect is a tax automation solution that performs sales and use tax calculations, rate updates and jurisdiction adjustments without infringing on existing workflows

Why Epicor?

- Epicor Tax Connect provides the accuracy and reliability Walton Signage desires, and eliminates labor intensive and error prone manual efforts

Benefits

- Automates and calculates taxes
- Reduces the cost of doing business
- Easier to manage audits
- Reliable, affordable and user-friendly
- Seamless integration with Epicor ERP solution

“Epicor Tax Connect automatically calculates our taxes, which reduces the company’s cost of doing business.”

Jennifer Mesiano
IT Manager, Walton Signage

Based in San Antonio, Texas, Walton Signage has been in the business of designing, manufacturing, shipping and installing corporate signage for more than 30 years. With 140 employees, Walton Signage blends corporate signage with brand strategy to deliver “customer first” solutions to its customers nationwide. Large national companies with locations throughout the United States look to Walton Signage for high-quality, turnkey signage programs that engage their customers and make their brand shine. Building quality around the world, customers consistently praise Walton Signage for making sure every detail is accounted for and projects are completed to spec, on time and on budget. To help keep projects on budget, Walton Signage needed a reliable and affordable way to automate and calculate sales and use taxes. Walton made the right choice with Epicor Tax Connect.

Powered by Avalara® AvaTax®, Epicor Tax Connect is a tax automation solution that performs sales and use tax calculations, rate updates and jurisdiction adjustments without infringing on existing workflows. With more than 12,500 U.S. and Canadian tax rules and rates that change continually, tax automation is a business necessity.

About Epicor

Epicor is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. Founded in 1984, Epicor serves 20,000 customers in more than 150 countries, providing solutions in over 30 languages.

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Walton Signage's IT Manager, Jennifer Mesiano, explains how difficult it is for the accounting department to keep up with changing tax rules and maintain tax rates and codes across the numerous cities, counties and states Walton Signage services nationwide. "We do business in potentially 5,000 new locations each year," said Mesiano. "Before Epicor, our accounting department would have to research the tax code for every new city, county or state to figure out the tax regulations and rules, not to mention maintenance when the rates change. It was extremely time consuming."

Fast Return on Investment with Epicor Tax Connect

Epicor Tax Connect solved a huge business problem for Walton Signage as the accounting department spent 10 to 12 hours a week on tax code research, according to Mesiano. By nature, any effort spent on sales and use tax compliance and related activities are non-revenue generating. Even if you invest the time and resources to get it right, you've still lost the productivity. Walton Signage saw automation as the only way to truly maintain compliance and minimize wasted productivity.

Looking to grow the business by 20-30% over the next three years, Epicor Tax Connect provides Walton Signage with an in-house business advantage. "Epicor Tax Connect automatically calculates our taxes, which reduces the company's cost of doing business," said Mesiano. "Our accounting department



can now spend their time on the additional billings we anticipate with the company's growth instead of spending time on tax code research. Plus, we can process invoices faster and easier."

Walton Signage needed a reliable system that could provide a practical amount of accuracy for charging taxes as incorrect sales and use tax calculations could cost the company in an audit. Epicor Tax Connect's calculations provide the accuracy and reliability Walton Signage desires, and eliminate labor intensive and error prone manual efforts. By alleviating compliance worries, Walton Signage can instead focus its

attention and resources on growing the business.

"With Epicor Tax Connect, all of our data is housed in one place, and more importantly, it reflects a high degree of accuracy, so it's easier to manage audits," said Mesiano. "We have high confidence that we are applying the correct tax rates to our customer billings minimizing the need for error correction or negative audit assessment."



Simple and Seamless Integration

Walton Signage worked closely with Epicor authorized partner Avalara to help them select and implement a true tax automation solution. Having great success in running Epicor's enterprise resource planning (ERP) system as its business software solution, Walton Signage made a firm stance to stay committed to Epicor products. Mesiano explained that Avalara was a great support and helped Walton Signage understand how the two systems would work together, as well as provided extensive worksheets to select the right tax codes for ERP entry.

"Integrating Epicor Tax Connect with our ERP system was simple and seamless," said Mesiano. "Epicor Tax Connect requires no software to install, which is great. After all of the tax codes were put in correctly we tested the system to make sure it was assessing everything accurately and we haven't had to do anything since. The system is extremely user-friendly."

Because Epicor Tax Connect is fully integrated into Walton Signage's ERP system management occurs right in the invoicing and order entry screens. Fully detailed and dynamic reports are easily generated for planning, review and auditing purposes. In addition, Walton Signage no longer has to create new custom reports because they use Epicor Tax Connect's out-of-the-box reports. According to Mesiano, this is extremely helpful to Walton Signage since the company heavily uses customized reports throughout the rest of its business operations.

"Epicor Tax Connect has helped bridge a huge gap in the way we invoice and tax sales," said Mesiano.

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