



**Epicor ERP  
Education Course Descriptions  
(E10)  
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Revision: July 03, 2014 2:19 a.m.

Total pages: 145

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# Getting Started

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## Introduction to Epicor ERP

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This introductory course provides an overview of the Epicor application, its major capabilities, and a general understanding of overall features and functionality.

The Epicor application is delivered **out of the box** with built-in workflow processes that take a quote for a product or service, and then eventually post the cash results of this transaction to a specific financial book.

This workflow begins with the **sales order process**. You start this process in customer relationship management and develop sales quotes, which later become sales orders.

Next, you leverage the engineering functionality. You define a method of manufacturing for each part. These engineered part records are then used on jobs for production within a manufacturing center. Manage the materials through purchasing and inventory, and then schedule for material releases to jobs for on-time completion.

The workflow concludes when the results of these transactions are accurately recorded within the financial functionality of the following programs:

- Accounts Receivable
- Accounts Payable
- Cash Management
- General Ledger

Epicor ERP is an Enterprise Resource Planning product with many inner-working modules. No additional computer programming is required to make the modules work together.

## Audience

Specific audiences will benefit from this course.

- All Users - This course targets an audience with little to no detailed knowledge of the Epicor application and its overall functionality.

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Computer and Internet Navigation Basics** - The Epicor application operates in a Microsoft Windows® environment; therefore, knowing how to navigate in a Windows environment and the Web will help facilitate the learning experience. Students should be familiar with computer hardware components such as the keyboard and mouse, navigation keys on the keyboard, such as the Tab and Enter keys, and navigation buttons, such as the Back button.

## Customers

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This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.

This course explains the process of establishing maintenance programs, as well as the creation of the customer master file.

Upon successful completion of this course, you will be able to:

- Identify the three milestones in the life cycle of a customer.
- Describe the relationship between various customer record entities.
- Identify core modules that interact with which customer records interact.
- List subsidiary master files that contribute to the makeup of a customer record.
- Describe the attributes of a customer record.
- Understand how sold to, bill to and ship to information created in customer records are used in daily quotation, sales order and AR invoice processing.

## Audience

Specific audiences will benefit from this course.

- All users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

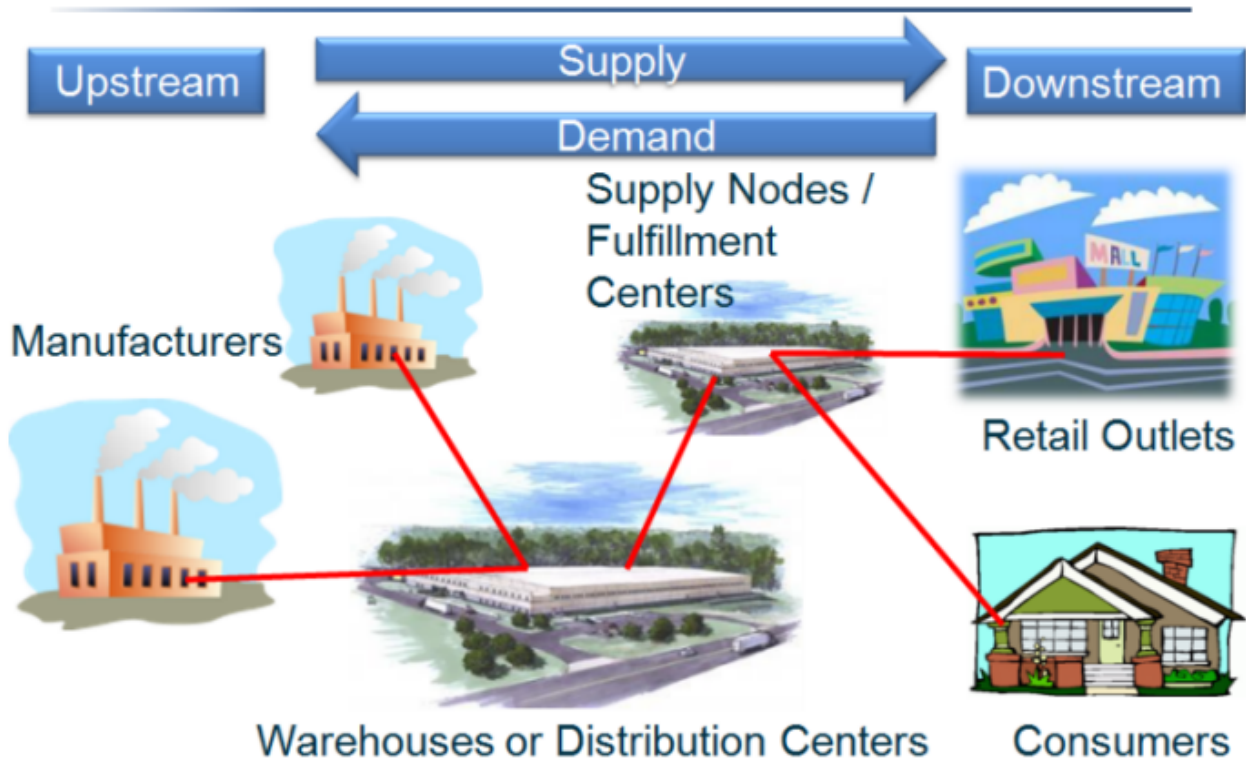
- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.

## Distribution Foundations

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This course introduces the distribution capabilities of the Epicor application. A distributor is typically the middleman between the manufacturer and a product supplier. After a product is manufactured, it is shipped to a distributor. The distributor either ships the product to an inter-company location, such as a site, or sells the product to customers or retailers.

## Distribution is Supply Chain Linkage



The Fulfillment Workbench is the center point of distribution processing; it can be used to manage distribution fulfillment tasks such as allocating and reserving inventory, and is designed to satisfy demand created from sales orders, job orders, and transfer orders. This course introduces you to the maintenance programs in the Epicor application you use to define key operational parameters used in the Fulfillment Workbench and other distribution-related programs.

Upon successful completion of this course, you will be able to:

- Understand the key maintenance programs that must be set up prior to use of distribution functions.
- Understand the process flow in a typical distribution company.
- Identify the Epicor ERP programs and modules relevant to the distribution processing flow.

### Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Shop Floor Employee
- Shop Floor Manager
- Scheduler
- Shipping and Receiving
- Production Manager
- Engineer
- Order Entry Staff

- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

## Employees

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This course introduces the maintenance programs that relate to employees in your company. The course emphasizes three maintenance programs used to identify the different roles employees may have throughout the Epicor application. It also focuses on the relationship between the maintenance programs and the application as a whole. This course discusses the unique characteristics found in each program and contains workshops that demonstrate how to create a new record in each of these programs.

Upon successful completion of this course, you will be able to:

- Identify the three employee maintenance programs.
- Understand the setup processes for the three employee maintenance programs.
- Understand the roles for buyers, shop employees, and the work force.
- Become familiar with the integration points in the application that are influenced by employees.

## Audience

Specific audiences will benefit from this course.

- All users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

## Epicor Delta Education - Advanced Financial Reporting

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The Epicor Advanced Financial Reporting Delta course introduces key features and functionality enhancements in the AFR product.

The AFR Delta course is designed for an audience already familiar with the AFR product. It focuses specifically on features and enhancements released with new service packs. Therefore, knowledge of the basic features that make up AFR and its reports is essential.

### Audience

Specific audiences will benefit from this course.

- CFO/Controller
- COO/Operations Manager
- Account Manager
- Employees who design financial reports for the company

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Introduction to Advanced Financial Reporting Course** - The Introduction to Advanced Financial Reporting course is designed for customers who are new to Advanced Financial Reporting (AFR), or for those who want to reinforce their knowledge of report designing basics. The goal of this course is to help customers that use AFR better understand the modules and application tools that make up AFR, as well as how to create, manage, and view basic general ledger (GL) reports via AFR.

## Epicor 10 Delta Education - Financial Management

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The Epicor 10 Delta Education - Financials course introduces key financial management features and functionality enhancements in Epicor 10.

- Accounts Payable (AP) Enhancements
- Accounts Receivable (AR) Enhancements
- General Ledger (GL) Enhancements

This Epicor 10 Delta Education - Financials course is designed for an audience experienced with the existing Epicor ERP application, technical knowledge, and skills. Experience with the previous version of this application is important as Epicor 10 incorporates the functionality and uses the same service-oriented architecture (SOA) as Epicor ERP. Delta education, for the experienced audience, focuses on new Epicor 10 release functionality that was not available as a part of Epicor ERP.



## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk
- Payroll Staff
- System Administrator

## Prerequisites

In order to complete the workshops in this course, all necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager EpicorCAMepicor.com. It is also important that you understand the prerequisite knowledge contained in other valuable courses.



**Note** This course is designed for experienced Epicor ERP users. Please use the Epicor Curriculum Roadmaps for the defined Epicor courses that are valuable to the Financial focus.

- Complete reviews of the Epicor 9.05 Functional Webcasts and the Epicor 9.05 Feature Summary
  1. Log in to EPICweb.
  2. Navigate to the **Documentation > Epicor 9** dashboard.
  3. Under the **More Information** heading click the **Feature Summaries** link.
  4. To review a Feature Summary, click on the **Epicor 9 Feature Summary - updated for X.XX.XXX** (where X.XX.XXX represent the Epicor application version and build).
  5. To review the **X.XX Service Pack Highlight** webcast (where X.XX represent the Epicor application version) click on **here**.
  6. Select the webcast by clicking on **View Now**.
- Meet the knowledge requirements of navigational and financial functional knowledge within Epicor ERP.

## Epicor 10 Delta Course - Manufacturing and Supply Chain Management

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The Epicor 10 Delta Education - Manufacturing and Supply Chain Management course introduces key manufacturing and supply chain functionality enhancements in Epicor 10.

The following enhancements are reviewed:

- Service Management Enhancements.

This Epicor 10 Delta Education - Manufacturing and Supply Chain Management course is designed for an audience experienced with the existing Epicor ERP application, technical knowledge, and skills. Experience with the previous version of this application is important as Epicor 10 incorporates the functionality and uses the same service-oriented

architecture (SOA) as Epicor ERP. Delta education, for the experienced audience, focuses on new Epicor 10 release functionality that was not available as a part of Epicor ERP.

## Audience

Specific audiences will benefit from this course.

- Material Manager
- Sales Manager
- Order Entry Staff
- Service Technician
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative
- Shipping/Receiving

## Prerequisites

In order to complete the workshops in this course, all necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager EpicorCAMEpicor.com. It is also important that you understand the prerequisite knowledge contained in other valuable courses.



**Note** This course is designed for experienced Epicor ERP users. Please use the Epicor Curriculum Roadmaps for the defined Epicor courses that are valuable to the Manufacturing and Supply Chain focus.

- Complete reviews of the Epicor 10 Functional Webcasts and the Epicor 10 Feature Summary
  1. Log in to EPICweb.
  2. Navigate to the **Documentation > Epicor** dashboard.
  3. Under the **More Information** heading click the **Feature Summaries** link.
  4. To review a Feature Summary, click on the **Epicor 10 Feature Summary - updated for X.XX.XXX** (where X.XX.XXX represent the Epicor application version and build).
  5. To review the **X.XX Service Pack Highlight** webcast (where X.XX represent the Epicor application version) click on **here**.
  6. Select the webcast by clicking on **View Now**.
- Meet the knowledge requirements of navigational, technical, and framework functional knowledge in Epicor ERP.

## Epicor Delta Education - Tools Management

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This course introduces key features and functionality enhancements of the Epicor ERP 10 and its supplementary products.

Course concepts are designed for an audience experienced with the existing Epicor ERP application as well as technical knowledge and skills. The focus of the course content is on new release functionality.

The following enhancements are reviewed:

- Automatic Processing Enhancements
- Business Activity Queries Enhancements
- Business Process Management
- Customization Enhancements
- New Features Available in Documentation and Education
- New Epicor Web Access Environment
- Epicor Service Connect Enhancements
- Predictive Search
- Security Enhancements

### Audience

This course is designed for proficient end users, key users, or technical support representatives who have experience on the Epicor ERP product.

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

### Prerequisites

In order to complete the workshops in this course, all necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager EpicorCAMEpicor.com. It is also important that you understand the prerequisite knowledge contained in other valuable courses.



**Note** This course is designed for experienced Epicor ERP users. Please use the Epicor ERP Curriculum Roadmaps for the defined courses that are valuable to the Framework and Tools part of the Epicor ERP application.

- Complete reviews of the Epicor 10 functional Webcasts and the Epicor 10 Feature Summary.
  1. Log in to EPICweb.
  2. Navigate to the **Documentation > Epicor** dashboard.
  3. Under the **More Information** heading click the **Feature Summaries** link.
  4. To review a Feature Summary, click on the **Epicor 10 Feature Summary - updated for X.XX.XXX** (where X.XX.XXX represent the Epicor application version and build).

5. To review the **X.XX Service Pack Highlight** webcast (where X.XX represent the Epicor application version) click on **here**.
  6. Select the webcast by clicking on **View Now**.
- Meet the knowledge requirements of navigational, technical, and framework functional knowledge in Epicor ERP.

## Epicor ERP for Enterprise Course

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This course introduces Enterprise users to the features and functions of the Epicor ERP application. Enterprise users will explore, through hands-on training, the complimentary functionality available in the Epicor ERP application.

Epicor ERP is infused with concepts originally released with the Enterprise application. Epicor ERP builds on these concepts, incorporating them with .NET technology, a highly customizable interface, and additional financial and supply chain management features not available through Enterprise. This course is intended to demonstrate these features specifically for Enterprise users, giving them an opportunity to compare the Epicor ERP application against their current system.

Moving to a new application is a difficult task. By the end of this course, Enterprise users will be better able to evaluate the benefits of Epicor ERP, factoring the gains in functions and features against the costs of migration and training. After finishing this course, Enterprise users should speak with their Epicor account managers to learn more about the additional consulting and training resources they can leverage for their potential migration to Epicor ERP.

Upon successful completion of this course, you will be able to:

- Learn how to navigate the Epicor ERP interface
- Personalize the Epicor ERP interface to match your use of the application
- Generate a basic chart of accounts
- Create a book and post to multiple books
- Generate and write allocations to the GL
- Create AR and AP invoices, cash receipts, and payments
- Create asset records and calculate depreciation
- Understand the basic functionality of Advanced Financial Reporting (AFR)
- Learn how to create business activity queries (BAQs) and use them in custom dashboards
- Create a customized version of a program
- Explore both the Enterprise Search and Business Process Management (BPM) functionality
- Understand the key characteristics and styles of distributor and distribution enterprises.
- Understand the end-to-end process flow in a typical distribution company.
- Identify the Epicor ERP programs and modules relevant to the distribution flow
- Understand the purpose and features of project management.
- Use the Project Tracker to track a project.
- Create, invoice and renew service contracts.
- Generate quotes for contract renewals.

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- CFO/Controller
- Cost Accountant
- AP Clerk
- AR Clerk
- Purchasing Staff/Buyer
- QA Inspector
- Sales Manager
- Account Manager
- Sales Representative
- Order Entry Staff
- Shipping and Receiving
- Customer Service Representative
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

This course is an introduction to the Epicor ERP application. Because of this, no course prerequisites are recommended.

However, since this course focuses on complimentary features between the Enterprise and Epicor ERP applications, users should have a good understanding of Enterprise processes and functions before taking this course.

## Financial Foundations

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This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.

Upon successful completion of this course, you will be able to:

- Explain the importance of financial setup.
- Identify the Epicor ERP financial modules.
- Identify and analyze key financial maintenance programs.

## Audience

Specific audiences will benefit from this course.

- All users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

## Getting Started with Epicor ERP

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This instructor-led course is a comprehensive introduction to the Epicor ERP application. It is designed to give you a thorough base understanding of how to navigate and personalize the application, how to use trackers and includes a quote-to-cash system flow overview. This course contains the same content that can be found in the Introduction to Epicor ERP, Navigation, Personalization, Introduction to Trackers and System Flow courses.

Upon successful completion of this course, you will be able to:

- Log in to and exit the application.
- List the three levels of interface navigation.
- Describe the navigation features and elements available at each level.
- Use the main interface.
- Find and access programs within modules.
- Navigate within programs.
- Demonstrate use of the View menu, the Options menu, and the Favorites bar personalization.
- Describe tracker types, elements, and features.
- Describe tracker functionality and navigation.
- Retrieve data using trackers.
- Describe a simple quote to cash scenario.
- Create a quote, sales order, and job.
- View jobs in the Job Tracker.
- Create a purchase order.
- Receive purchased material.
- Issue job material.
- Report production.
- Ship products to customers.
- Invoice customers and receive payments.
- Enter and pay a supplier invoice.

- Define personalization and related functionality.
- Identify the main areas where personalization is available.
- Use personalization sheets, grid layouts, toolbars, and the tree view.
- Save and return personalizations to their default settings.

## Audience

Specific audiences will benefit from this course.

- All Users - This course targets an audience with little to no detailed knowledge of the Epicor application and its overall functionality.

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Computer and Internet Navigation Basics Course** - The application operates in a Microsoft® Windows® environment. Therefore, knowing how to navigate in a Windows environment and the Web facilitates the training experience. Navigation tools students should be familiar with computer hardware components such as the keyboard and mouse, navigation keys on the keyboard, such as the Tab and Enter keys, and navigation buttons, such as the Back button.

## Introduction to Trackers

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Trackers are inquiry programs you use to view detailed data from a variety of programs or applications. Although trackers do not provide end users with the ability to update information, they provide access to related information for a particular item or customer in one window without compromising the validity of the data.

This course introduces different types of trackers, the elements that make each type of tracker unique, and key features you can use for efficient tracker functionality. This course covers only a sampling of the tracker programs available in the Epicor application for the purpose of demonstrating specific functionality.

Upon successful completion of this course, you will be able to:

- Describe tracker types, elements, and features.
- Describe tracker functionality and navigation.
- Retrieve data using trackers.

## Audience

Specific audiences will benefit from this course.

- All users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Personalization Course** - This course covers how to personalize the Epicor application by adjusting the views, options, and toolbars to best suit your business needs. It also explains how to modify program interfaces to match your preferences.

## Knowledge Camp

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This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.

Upon successful completion of this course, you will be able to:

- Create a quote for a customer.
- Get manufacturing details to support quoted parts.
- Review the Quote Worksheet.
- Create an order for a customer.
- Pull a quote into an order.
- Create a job and link it to an order.
- Purchase and receive materials to support job requirements.
- Charge labor and burden to jobs.
- Work with subcontractor shipments.
- Complete jobs and ship products to a customer.
- Invoice the customer and collect cash.
- Pay the suppliers and issue checks.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk
- COO/Operations Manager
- Payroll Staff



- Shop Floor Employee
- Shop Floor Manager
- Scheduler
- Shipping and Receiving
- QA Inspector
- Production Manager
- Engineer
- Purchasing Staff/Buyer
- Sales Manager
- Order Entry Staff
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundation Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

## Knowledge Camp - Distribution and Supply Chain Management

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This course provides a high level overview of distribution/distributor operations and use of Epicor ERP Distribution and Supply Chain Management applications. It contains detailed conceptual information about these subjects, and also contains several workshops that acquaint you with various functional aspects of the Epicor application as they relate to distribution and Supply Chain Management processing. This includes order fulfillment, inventory allocation, warehouse logistics, and shipment management.

Upon successful completion of this course, you will be able to:

- Understand the key characteristics and styles of distributor and distribution enterprises.
- Understand the process flow in a typical distribution company.
- Describe distribution and Supply Chain Management terminology and how it relates to the Epicor application.
- Identify Epicor ERP Supply Chain Management programs and modules relevant to the distribution flow.
- Identify the Epicor University educational material that can provide you with additional education.

## Audience

Specific audiences will benefit from this course.

- Epicor end users
- Epicor Sales Representatives
- Epicor Consultants
- Epicor VAR Partners

Epicor end users with interest in this course include:

- Cost Accountant
- CFO/Controller
- AR Clerk
- COO/Operations Manager
- Shop Floor Employee
- Scheduler
- Shipping and Receiving
- QA Inspector
- Engineer
- Sales Manager
- Order Entry Staff
- Customer Service Representative
- Account Manager
- Sales Representative
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels within the application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Customer Course** - This course introduces fundamental concepts pertaining to the creation of customer records, as well as various maintenance programs necessary to define a customer in the application.

- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. Whether items are shipped from stock or from work in process, a shipping transaction is performed. All shipping transactions are captured during invoicing in the Accounts Receivable module, creating financial transactions that ultimately post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Parts Course** - This course introduces you to the building blocks that make up Part Maintenance, the cornerstone of the ERP application. This course focuses on the importance of Part Maintenance, required maintenance program setup, key fields in Part Maintenance, set up of manufactured part and purchased parts, and review of commonly used reports and inquiries.

## Manufacturing Foundations

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The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.

Upon successful completion of this course, you will be able to:

- Describe the components used to create an efficient manufacturing foundation.
- Identify the application integration points in your manufacturing environment.
- Break down and analyze the components of maintenance setup programs.
- Establish a working plan for your site.

## Audience

Specific audiences will benefit from this course.

- Shop Floor Manager
- Scheduler
- Production Manager
- Engineer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Recommended Industry Experience and Knowledge in the Manufacturing Planning Area (for example, APICS).**

## Navigation

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This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

Upon successful completion of this course, you will be able to:

- Run the application using the Classic Menu and Modern Shell Menu.
- Identify elements available on the Home Page.
- Use the Menu interface launched from the Home Page.
- Use the Modern Shell Menu settings.
- List the three levels of Classic Style interface navigation.
- Describe the navigation features and elements available at each level.
- Use the Classic Style main interface.
- Find and access programs within modules.
- Navigate within programs.

## Audience

Specific audiences will benefit from this course.

- All Users - This course targets an audience with little to no detailed knowledge of the Epicor application and its overall functionality.

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Computer and Internet Navigation Basics Course** - The application operates in a Microsoft® Windows® environment. Therefore, knowing how to navigate in a Windows environment and the Web facilitates the training experience. Navigation tools students should be familiar with computer hardware components such as the keyboard and mouse, navigation keys on the keyboard, such as the Tab and Enter keys, and navigation buttons, such as the Back button.

## Parts

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This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.

Reasons to enter a part in Part Maintenance include:

- Perform minimal data input.

- Allow reusability and traceability for buying, selling, manufacturing, and engineering items.
- Establish inventory for an item.
- Create a method of manufacture for an item.
- Create sales kit components for an item.

Upon successful completion of this course, you will be able to:

- Identify other maintenance programs that interact with Part Maintenance.
- Identify key fields in Part Maintenance.
- Create a manufactured part, purchased part, and sales kit part.
- Review commonly used reports and inquiries.

## Audience

Specific audiences will benefit from this course.

- Shop Floor Employee
- Shipping and Receiving
- Engineer
- Order Entry Staff
- Sales Engineer/Pre-Sales

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Manufacturing Foundations Course** - This course has been designed to introduce you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.

## Personalization

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This course covers how to personalize the Epicor application by adjusting the views, options, and toolbars to best suit your business needs. It also explains how to modify program interfaces to match your preferences.

Upon successful completion of this course, you will be able to:

- Review the personalization options on the Classic Style Menu.
- Review the personalization options on the Modern Shell Style Menu.
- Personalize sheets, grid layouts, toolbars, and the tree view.
- Save and return personalizations to their default setting.
- Modify program layouts to match your preferences.

- Export and Import personalizations.
- Delete personalizations.

## Audience

Specific audiences will benefit from this course.

- All Users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

## Suppliers

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This course covers the supplier record and the information located within Supplier Maintenance.

Suppliers are individuals or companies from whom you purchase goods or services. This course introduces Supplier Maintenance and its subsidiary programs and consists of the Epicor application walkthrough of each program and its key attributes.

You can establish two different relationships with a given supplier:

- Remit To
- Purchase Point

Both of these relationships are organized within a single supplier account in the application.

Upon successful completion of this course, you will be able to:

- Define a supplier.
- Identify modules that interact with suppliers.
- List subsidiary programs that contribute to the makeup of a supplier.
- Describe key attributes of a supplier record.

## Audience

Specific audiences will benefit from this course.

- AP Clerk
- Shipping and Receiving
- Purchasing Staff/Buyer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.

## System Flow

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This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

Upon successful completion of this course, you will be able to:

- Describe a simple quote to cash scenario.
- Create a quote, sales order, and job.
- Use the Job Tracker to view jobs.
- Create a purchase order.
- Receive purchased material.
- Issue job material.
- Report production.
- Ship products to customers.
- Invoice customers and receive payments.
- Enter and pay a supplier invoice.

## Audience

Specific audiences will benefit from this course.

- All Users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager

at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.



# Financial Management

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## Accounts Payable

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This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).

Hands-on workshops are included in this course to guide you through the AP setup steps and processes.

Upon successful completion of this course, you will be able to:

- Identify the company configuration and maintenance programs that relate to the accounts payable cycles.
- Process AP invoices, debit memos, and AP payments, using the procedures and transactional flows as a guideline.
- Differentiate between the types of AP invoice lines.
- Enter and record bank fees.
- Define AP allocations.
- Enter, approve, and void logged invoices.
- Match approved logged invoices with AP invoices.
- Void payments.
- Enter and apply AP prepayments.
- Create and use AP invoice adjustments.
- Transfer bank funds and adjust bank balances.
- Complete the bank reconciliation process.
- Enter and apply late cost invoices.
- Navigate through the trackers available in the AP module.
- Identify the documents, reports, and records necessary for tracking the AP process.

## Audience

Specific audiences will benefit from this course.

- AP Clerk
- CFO/Controller
- Cost Accountant

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager

at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

## Accounts Receivable

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This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Identify the company configuration and maintenance programs that relate to the AR processing cycle.
- Complete the AR sales order - payment cycle by using the process and transaction flow as a guideline.
- Complete the sales tax setup.
- Use national account relationships.
- Create reminder groups and generate customer reminder letters.
- Differentiate between the AR invoice types.
- Enter and use debit notes, miscellaneous cash receipts, deposit cash receipts, and AR prepayments.
- Reverse a cash receipt and identify situations when that action is applicable.
- Use AR write offs and adjustments.
- Apply credit memos and prepayments to invoices and cash receipts.
- Manage customer records.
- Identify documents, reports, and records necessary to track the AR cycle.

## Audience

Specific audiences will benefit from this course.

- AR Clerk
- CFO/Controller
- Cost Accountant

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

## Advanced Allocations

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The Advanced Allocations course describes the process of spreading particular total amounts booked to the general ledger (GL) into a more detailed and specific representation. This course discusses the creation and maintenance of allocation codes, as well as how to generate allocations, and how to view the history of allocations in the Epicor application.

Upon successful completion of this course, you will be able to:

- Enter allocation codes.
- Compare and contrast the available **Allocation Types** (Transactional and Balance-Based).
- Allocate amounts using four types of source date (account categories, journal codes, GL accounts/masks, and ranges of accounting segment values).
- Use target accounts with fixed value ratios and target accounts with formula based ratios.
- Formulate allocation criteria.
- Create tiered allocations.
- Batch and schedule allocations.
- Simulate Allocations.
- Generate Allocations.
- Track the history of allocations.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller

- AP Clerk
- AR Clerk
- COO/Operations Manager
- Payroll Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

## Advanced General Ledger

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This course combines general ledger (GL) features from several topics (such as multi-company management, multiple books, advanced allocations, consolidation, and GL account mapping) to encompass the information an advanced Epicor ERP GL user must know.

Upon successful completion of this course, you will be able to:

- Create revisions to configure the posting process on a transaction type
- Review GL transactions in the Review Journal before they post
- Use multiple books for financial reporting and analysis of the same business transactions
- Define account maps used to transfer journals between different charts of accounts
- Link secondary books to a source book
- Allocate amounts using four types of source data
- Create tiered GL allocations
- Batch, schedule, simulate, and generate allocations
- Maintain multi-company general ledger accounts
- Process multi-company journals

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- Accountant/Financial Specialist
- AP Manager
- AR Manager
- Payroll Manager

- System Administrator

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **Posting Engine** - This course provides an overview of the posting process concept for the Epicor application and the Posting Engine as the technology to implement this process. In addition, the course discusses how the posting engine provides flexibility and control over the financial transaction creation process in the Epicor application.

## Advanced Report Designing for AFR

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The Advanced Report Designing for AFR course guides users familiar with the Advanced Financial Reporting (AFR) Report Designer module through the creation of custom financial reports that include formulaic expressions, multiple versions of row sets, reporting trees, and dictionaries. It also demonstrates how to add drill down reports to the transactional level, drill down to different reports from particular rows, update Report Definition Language (RDL) file formats, and create report templates using Microsoft® Business Intelligence Studio®.

Upon successful completion of this course, you will be able to:

- Create expressions using the Expression Builder.
- Create custom financial reports that include formulaic row and column expressions.
- Set up reporting trees using the Reporting Tree Wizard.
- Create Row Sets using the Row Set Wizard.
- Set up drill down reports to display detailed data and transaction data.
- Set up Advanced Presentation options for reports, including currency setup.
- Create a report template using Microsoft Visual Studio.
- Create a column set using the Column Set Wizard and Column Expression Assistant.
- Use the RDL Merge tool when adding or removing report columns.
- Adjust column widths and page sizes.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- COO/Operations Manager
- Account Manager
- Employees who design financial reports for the company

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Introduction to Advanced Financial Reporting Course** - The Introduction to Advanced Financial Reporting course is designed for customers who are new to Advanced Financial Reporting (AFR), or for those who want to reinforce their knowledge of report designing basics. The goal of this course is to help customers that use AFR better understand the modules and application tools that make up AFR, as well as how to create, manage, and view basic general ledger (GL) reports via AFR.

## Asset Management

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In business and accounting, assets are everything of value that is owned by a person or company. The company's balance sheet displays the monetary value of the assets owned by the company. Epicor's Asset Management module allows you to set up assets using various depreciation methods and conventions, record additions and disposals, and calculate and post depreciations. This course reviews the necessary setup for the Asset Management module and reviews the processes available for managing assets.

Upon successful completion of this course, you will be able to:

- Recognize depreciation methods and depreciation conventions supported in the Epicor application.
- Configure Asset Management.
- Identify Asset Management maintenance programs.
- Set up and define various Asset Management records.
- Review an asset's GL transactions.
- Process asset activities.
- Report and track assets.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user

interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **Recommended** - An understanding of asset management principles and practices.

## Bank Reconciliation

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The Bank Reconciliation course guides you through the process of reconciling bank statements with all cash transactions created through accounts payable functions, payroll check processing, accounts receivable cash receipts, and payment instruments. This program only processes and clears cash transactions. Cash transactions are reconciled by creating and editing bank account statements.

This course reviews the various sheets and fields available in Bank Reconciliation Entry and guides you through a step-by-step process of how to reconcile bank statements.

Upon successful completion of this course, you will be able to:

- Add bank reconciliation statements.
- Link bank reconciliation statements to specific bank transactions.
- Reconcile bank statements to cash transactions.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- AP Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).

## Cash Management

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This course is designed to review the concepts and reporting tools available in the Cash Management module. Topics of discussion include maintenance program setup and how the Cash Management functionality impacts the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Identify the maintenance programs that relate to the cash management processing cycle.
- Complete the cash management cycle by using the process and transaction flow as a guideline.
- Set up your environment to use petty cash functionality.
- Create petty cash transactions and reports.
- Use processes and trackers related to Accounts Payable, including AP Payment Entry.
- Use processes and trackers related to Accounts Receivable, including Cash Receipt Entry and Reverse Cash Receipt.
- Use Payroll programs on a cash basis.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk
- Payroll Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.



- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **Accounts Receivable Course** -This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.
- **Accounts Payable Course** -This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).

## Credit Card Processing

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This course explains the setup considerations necessary to implement the use of credit cards and how to process transactions using credit cards. Topics include company configuration and maintenance program setup parameters, security settings, and the injunction of credit cards with sales orders, shipments, invoices, and cash receipt payments. Hands-on workshops are included to guide you through the various setup and credit card processes.

Upon successful completion of this course, you will be able to:

- List the features and functionality available in Credit Card Processing.
- Identify the company configuration settings and maintenance program parameters that must be maintained in order to successfully complete the Credit Card Processing cycle.
- Enter, ship, and invoice sales orders that process credit card transactions.
- Apply credit card payments using Cash Receipt Entry.
- Review applicable reports and trackers to examine transactions.

## Audience

Specific audiences will benefit from this course.

- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** -This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.

- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Currency Management

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This course explains the setup considerations necessary when implementing Currency Management, and demonstrates how to utilize and account for ever-changing exchange rates within your application.

The topics covered in this course include base currency configuration, the creation and maintenance of Currency Management, the revaluation of currency exchange rates, and best practices for dealing with currency exchange rate changes on sales orders, purchase orders, invoices, bank balances, and payments.

Hands-on workshops are included to guide you through the above topics and provide you with detailed examples of the Currency Management process flow.

Upon successful completion of this course, you will be able to:

- Enter a currency record.
- Understand how a company's base currency is configured.
- Set up and maintain currency code exchange rates.
- Modify customer and supplier country and currency codes.
- Create and lock in currency exchange rates on orders and invoices.
- Pay accounts payable (AP) invoices in a foreign currency.
- Record foreign currency cash receipts.
- Run the Currency Revaluation Process and use the report derived from it.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AP Clerk
- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.

- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **System Flow** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

## Debit Note Processing

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This course explains the setup considerations necessary to implement debit notes and how to process transactions using debit notes.

Throughout the course, you will find hands-on workshops that guide you through the debit note process.

For purposes of this course, assume the role of the supplier.

Upon successful completion of this course, you will be able to:

- Create bank accounts that allow cash receipt entry groups to post with debit notes.
- Use the features and functions available when processing debit notes.
- Apply debit notes that are not specific to an invoice.
- Apply cash and a debit note to the same invoice.
- Create a separate debit note using Cash Receipt Entry.
- Use the reports and trackers that apply to debit notes.

## Audience

Specific audiences will benefit from this course.

- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Deferred Revenue Accounting

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This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools that relate to the Deferred Revenue Accounting module.

Deferred revenue stems from the accounting concept of revenue recognition, under which revenues are recognized only when the earnings process is complete.

Deferred revenue is recorded in specific industries under particular circumstances.

Upon successful completion of this course, you will be able to:

- Identify key maintenance programs that impact the deferred revenue accounting process.
- Identify the deferred revenue account for your company.
- Understand revenue amortization codes and schedules.
- Understand how fiscal calendars relate to revenue amortization codes and dates.
- Enable deferred revenue for product groups and customers.
- Post a deferred revenue invoice.
- Recognize revenue for a deferred revenue invoice based on the established amortization schedule.
- Update a posted invoice.
- Place multiple amortization periods on hold.
- Review useful deferred revenue reports and trackers.

### Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AR Clerk

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Financial Foundations** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **Accounts Receivable** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Financial Report Designer

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The Financial Report Designer course reviews the creation of balance sheets and income statements using the General Ledger (GL) module's **Financial Report Designer**.

Topics of discussion include basic financial report formatting options, the Report Wizard tool, custom reporting, and processing and printing financial reports.

Multiple hands-on workshops guide you through the report design process.

Upon successful completion of this course, you will be able to:

- Create a balance sheet and an income statement using the Financial Report Designer's (FRD) Report Wizard tool.
- Format financial reports.
- Design custom financial reports without the assistance of the Report Wizard tool.
- Process and print financial statements within the General Ledger (GL) module.
- Save financial reports as Excel spreadsheets.

### Audience

Specific audiences will benefit from this course.

- CFO/Controller
- Accountant

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

## General Ledger

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This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

Upon successful completion of this course, you will be able to:

- Identify the key maintenance program configurations that directly impact the general ledger cycle.
- Construct a GL account by creating account segments.

- Define segment values and generate a chart of accounts (COA) based on these definitions.
- Create, close, and reopen fiscal periods in multiple fiscal calendars.
- Analyze how GL control types and GL control codes affect the GL transaction hierarchy.
- Post manual, recurring, allocated and reversing journal entries.
- Identify the reports and trackers that are important to review in order to maintain GL integrity.

## Audience

Specific audiences will benefit from this course.

- AP Clerk
- AR Clerk
- CFO/Controller
- Cost Accountant
- Payroll Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.

## Introduction to Advanced Financial Reporting

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The Introduction to Advanced Financial Reporting course is designed for users who are new to Advanced Financial Reporting (AFR), or for those who want to reinforce their knowledge of report designing basics.

The goal of this course is to help users utilizing AFR better understand the modules and application tools that make up AFR, as well as how to create, manage, and view basic general ledger (GL) reports via AFR.

Upon successful completion of this course, you will be able to:

- Understand the application tools and modules that make up the AFR application.
- Know the significance of the AFR data replication process.
- Design financial report dimensions (row sets, column sets, and reporting trees).
- Work with the Expression Builder in the Report Designer to define the data on which you want to report.

- Add a report header and footer.
- Copy and paste reports and report dimensions.
- Drill down a summary report to display a detailed report.
- Generate report previews.
- Generate report definition language (RDL) files.
- View, print, and export reports you design.

## Audience

Specific audiences will benefit from this course.

- Account Manager
- CFO/Controller
- System Administrator
- Financial Report Designers

## Prerequisites

To complete the workshops in this course, Epicor Advanced Financial Reporting (AFR) must be installed, licensed, and configured with the training environment for your Enterprise Resource Planning (ERP) system (for example, Epicor ERP, or Prophet 21). Also, the setup steps found in the Environment Setup topic must be already in place.

For information on how to install, license, or configure AFR, contact your Epicor Customer Account Manager (EpicorCAM@epicor.com) or Technical Support.

## Job Costing

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This course reviews the Epicor application concept of job costing, as well as the reporting tools and setup steps available for maintaining general ledger validity within your company. Topics of discussion include the general ledger (GL) inventory interface, GL control setup and usage, and other job costing processes available within the application.

This course is organized into seven sections:

1. Epicor ERP Accounting Basics
2. Manufacturing Business Cycles
3. Costing Methods
4. Resource Groups and Resources
5. Daily Job Costing Processes
6. Transaction Analysis
7. Specialized Job Costing Processes

The course's appendix includes a valuable tool known as the Epicor Inventory Transaction Hierarchy.

Upon successful completion of this course, you will be able to:

- Understand Epicor ERP accounting basics and manufacturing business cycles.
- Note the differences between manufacturing environment types.
- Evaluate and set up the process for costing jobs.
- Identify the components and calculations used to generate estimated costs.
- Identify different approaches for utilizing resource groups and resources.
- Explain how costing data is accumulated to determine at the final cost on each job record.
- Understand the Landed Cost processing.
- Analyze inventory transactions.
- Utilize Costing Workbench functionality.
- Understand the Epicor Inventory Transaction Hierarchy.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- Engineer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **General Ledger** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.



## Multi-Company

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This course reviews setup steps for a multi-company environment, as well as concepts, processes, reports, and trackers. Topics include multi-company functionality setup, global record maintenance, multi-company journals, inter-company trading, central payment transactions, and the consolidation process.

Upon successful completion of this course, you will be able to:

- Identify and complete the important external system and company integration steps necessary to work in a multi-company environment
- Create global records for customers, suppliers, and parts
- Maintain multi-company general ledger accounts
- Process multi-company journals
- Trade goods between internal companies
- Set up and process central payments
- Explain the significance of source and target companies
- Describe the difference between source, target, and intermediate books
- Consolidate to a parent company

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AP Clerk
- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

## Multi-site Management

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This course reviews Multi-Site concepts and reporting. Course topics include master table setup, transfer orders, and required planning and manufacturing that takes place in a multi-site environment. You will also learn about site transfer definitions and how this is set up.

Hands-on workshops guide you through the setup and processes.

Upon successful completion of this course, you will be able to:

- Identify the company configuration and master files that relate to the Multi-site process flow.
- Utilize a multi-site environment in the Epicor application.
- Explain the process and transaction flow for the Multi-site process.
- Establish sites that manufacture goods for other sites.
- Outline the site structure in the application.
- Pass transactions between sites and monitor automatic data value updates.

### Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.

## Payment Instruments

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The Payment Instruments Course describes and demonstrates features of the Payment Instruments module, which is a child module of both Accounts Receivable (AR) and Accounts Payable (AP). Payment instrument is a generic term that covers different types of negotiable instruments used for payment. At a high level, payment instruments are any documents that instruct a bank to make a payment on a future date.

Upon successful completion of this course, you will be able to:

- Set up payment instrument defaults in Company Configuration.
- Enter and understand the need for different payment instrument statuses and types.
- Identify the pay method types that affect processing payment instruments.
- Generate and receive a pre-authorized promissory note.
- Batch multiple invoices under a single promissory note.
- Update a promissory note.
- Change the promissory note status.

### Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AP Clerk
- AR Clerk
- Purchasing Staff/Buyer
- Sales Manager
- Account Manager

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.
- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation

and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).

## Payroll

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This course reviews the Payroll module's concepts and reporting tools. Topics of discussion include maintenance program setup, various Payroll processes, and the impact these processes have on the general ledger. Hands-on workshops guide you through the Payroll setup steps and processes.

Upon successful completion of this course, you will be able to:

- Use the features and functionality available in the Payroll module.
- Perform related company configuration and maintenance program settings for the Payroll module.
- Trace the payroll and labor hierarchical flow to selected general ledger expense accounts.
- Identify documents and records necessary to process an accurate payroll.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- Payroll Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.

## Posting Engine

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This course provides an overview of the posting process concept for the Epicor application and the Posting Engine as the technology to implement this process. In addition, the course discusses how the posting engine provides flexibility and control over the financial transaction creation process in the Epicor application.

Upon successful completion of this course, you will be able to:

- Explain the unified posting process for all business transactions.

- Manage the flexible, rule-based posting mechanism.
- Demonstrate how user-defined business entities drive posting rules.
- Identify the automated handling of multiple books, currency conversions, and rounding differences.

## Audience

Specific audiences will benefit from this course.

- Consultants and partners implementing Epicor ERP or working with customers who are looking to change their current (or converted) financial structure.

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **Industry Knowledge:**
  - A consultant or partner focused on the Epicor ERP posting engine should have the standard amount of career experience required for any consultant, plus a background in accounting, specifically general ledger structure and hierarchical flow. International accounting experience is also beneficial. Some experience working on the technical side of a software package is helpful, because understanding the posting engine requires knowledge of the posting rules written by the system administrators.
  - At least one year experience working with the financial modules (prior versions) is beneficial but not a requirement since the posting engine is a new functionality.

## Rebates

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This course discusses the Rebates, Promotions, and Royalties module. This module enables you to compound rebates for sold-to, bill-to, or other designated customers based on product group sales or specific product sales during a contract duration. When the contract period is complete, use the Rebates, Promotions, and Royalties module to generate payments. Multiple rebate contracts can be active at once; this allows a parent company to qualify and receive a rebate on sale for an entire year. Child companies within the parent company qualify and receive rebates periodically, independent of other rebate contracts.

This course focuses on the rebates flow in the Epicor application, rebate contract and schedule creation, the addition of customers or customer groups for rebate qualification, the definition of products or product groups included in a rebate, rebate processing, and rebate adjustments. It also explores multiple trackers and reports that aid in efficient rebate administration practices.

Upon successful completion of this course, you will be able to:

- Understand the rebates functionality.

- Create rebate contracts.
- Define specific parts or product groups to include or exclude from a rebate contract.
- Establish rebate calculation and payment schedules.
- Add customers or customer groups to a rebate contract.
- Process rebate contracts for credit accrual and payments by running the Generate Rebate Transactions process and posting them through Accounts Receivable (AR) and Accounts Payable (AR) Invoice Entry.
- Perform rebate adjustment to an unposted transaction in Rebate Transaction Adjustment.
- Delete a generated rebate.
- Track rebate contracts using the Rebate Contract Tracker and the Rebate Contract Status dashboard.
- Add a rebate supplier to a customer's master record.
- View Rebate Contract Transactions and Rebate Contract Summary reports.
- Apply a credit memo to an open invoice.
- Create a payment for a customer-earned rebate.

## Audience

Specific audiences will benefit from this course.

- AP Clerk
- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **Recommended Industry Knowledge** - Understand the functionality of the current release of the Epicor application.

## Tax Connect

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This course describes the setup steps and configuration necessary to ensure proper integration between Avalara's® AvaTax® product and Epicor's Tax Connect module.

This course provides you with an overview of Tax Connect functionality including:

- Setup
- Address Validation
- Tax Calculations

Upon successful completion of this course, you will be able to:

- Manage the features and functionality available when the Tax Connect license is activated.
- Configure your company to properly enable the Tax Connect function.
- Use Tax Connect to successfully integrate your company's sales tax and use tax data with the Avalara® AvaTax® service.
- Complete sales tax processing for customer transactions on both Epicor and on AvaTax screens and reports.
- Validate customer and ship to addresses on a recurring schedule using Customer Maintenance and the Bulk Address Validation process.
- Review tax calculation details for your transactions by accessing the Tax Connect Results screen from the Actions menu of Sales Order Entry or AR Invoice Entry.
- Understand how to perform sales tax exemption overrides for customer transactions.
- Complete use tax processing for supplier transactions on both Epicor and on AvaTax screens and reports.
- Analyze the invoice records and related tax charges in the AvaTax Admin Console.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AP Clerk
- AR Clerk
- AR Manager
- Accounting Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.

- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.
- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).

## Tax Engine

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This course is designed to review the concepts and tools available for tax setup and functionality in the Epicor application. Topics covered include tax setup and the various processes which utilize the tax engine.

Upon successful completion of this course, you will be able to:

- Set up Tax Rates, Tax Types, Tax Liabilities, and Product Tax Categories.
- Use Custom Tax Algorithms.
- Implement tax setups according to some regional or national requirements.
- Run various tax reports.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AP Clerk
- AR Clerk

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Accounts Payable Course** This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).
- **Accounts Receivable Course** This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.
- **General Ledger Course** This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.



## Epicor XL Connect

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This course focuses on the main features of Epicor XL Connect and how to use this Excel-based application to design initial reports and review completed reports, entirely in Microsoft® Excel®.

Upon successful completion of this course, you will be able to:

- Identify the functions of Epicor XL Connect.
- Create a simple Profit and Loss statement using an XL Connect template.
- Create a dynamic Epicor XL Connect report from scratch.
- Create an Epicor XL Connect template.

### Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk
- COO/Operations Manager
- Production Manager
- Engineer
- Sales Manager
- Customer Service Representative
- Account Manager
- Sales Representative
- System Administrator
- IT/Technical Staff

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

**Recommended Industry Knowledge** - You must have a solid knowledge of Microsoft Excel concepts and reporting functionality.

## Year End Processing and Procedures

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This course is designed to review a series of proposed methods for closing a company's fiscal year. It is important to remember that each company's year end close and housekeeping procedures include action items unique to

its business methods and operations. The information in this course should only serve as a guide to developing procedures specific to your company.

Procedures suggested throughout this course should not be interpreted as a sole listing of effective methods.

Upon successful completion of this course, you will be able to:

- Recognize records to process and post at year end close time.
- Identify items to verify or write-off before a year end close.
- Understand and differentiate between the four business cycles' year end processes.
- Commit inventory, COS and WIP transactions to the general ledger (GL).
- Reconcile accounts, statements, registers and records.
- Close the fiscal year.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- Payroll Staff

## Prerequisites

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- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.
- **General Ledger Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work within the General Ledger (GL) module.
- **Payroll Processing Course** - This course reviews the Payroll module's concepts and reporting tools. Topics of discussion include maintenance program setup, various Payroll processes, and the impact these processes have on the general ledger. Hands-on workshops guide you through the Payroll setup steps and processes.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

# Material Management

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## Buyer's Workbench

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This course is designed to introduce topics related to the Buyer Workbench process.

Upon successful completion of this course, you will be able to:

- Review ratings assigned to a supplier.
- Assign attributes to a supplier.
- Create requests for quote (RFQs) for job-related and quoted material.
- Review reports and trackers.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- Purchasing Staff/Buyer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
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- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.

## Cycle Counting

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This course introduces the concepts of cycle and full physical counting and provides information on the configuration of the product required to lay the foundation for these activities. Hands on workshops guide you through the cycle counting process.

Upon successful completion of this course, you will be able to:

- Define cycle and full physical counting.
- Determine cycle and full physical counting parameters.
- List the steps in the operation to complete a cycle or full physical count.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- Shop Floor Employee
- Shop Floor Manager
- Shipping and Receiving
- Production Manager
- Purchasing Staff/Buyer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.

## Inventory Management

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This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.

Upon successful completion of this course, you will be able to:

- Define user-definable company and site parameters that govern Inventory Management processing.
- Create new warehouses and warehouse bins using Warehouse Maintenance and Warehouse Bin Maintenance.
- Generate warehouse bins using the Bin Setup Wizard.
- Define Unit of Measure (UOM), UOM Class, part class and product group codes for assignment on part records.
- Create new parts using Part Maintenance and identify important inventory data fields.
- Perform inventory transactions such as quantity adjustments, order shipments, receipts, job material issuance, returns and transfers.
- Configure and process a cycle count to maintain accurate inventory counts.
- Describe what inventory reporting options are available in Epicor ERP.

### Audience

Specific audiences will benefit from this course.

- Cost Accountant
- Shipping and Receiving
- Material Handler
- Production Manager

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Recommended Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.

## Inventory Management - Specialized Processing

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This course builds on the basic inventory concepts introduced in the Inventory Management course. It provides detailed information on the use of specialized inventory processing, including part cross referencing, material backflushing, lot / serial number tracking and management of customer and supplier owned inventories.

Upon successful completion of this course, you will be able to:

- Define the difference between part, supply side, demand side and internal cross referencing.
- Create product code, internal, manufacturer, supplier and customer part cross-references.
- Understand how material backflushing operates.
- Create and generate lot numbers for inventory tracking purposes.
- Establish serial number parameters and masking to standardize the serialization of parts.
- Perform Customer Managed Inventory (CMI) and Supplier Managed Inventory (SMI) processing.

### Audience

Specific audiences will benefit from this course.

- Cost Accountant
- Shipping and Receiving
- Material Handler
- Production Manager

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Recommended Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Recommended Inventory Management** - This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.

## Landed Cost

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Landed Cost functionality offers significant benefits for customers who import materials on a regular basis. The cost of freight, insurance, and import duties can greatly impact margins. Use this functionality to track those costs accurately against the parts to which they apply. This ensures the selling or assembly price reflects the true cost of the materials, parts, or finished goods.

Upon successful completion of this course, you will be able to:

- Identify key features of Landed Cost.
- Set up Landed Cost functionality in the following programs:
  - Country Maintenance
  - Company Configuration
  - HS Commodity Maintenance
  - Import Preference Scheme Maintenance
  - Import Tariff Maintenance
  - Purchasing Miscellaneous Charge/Credit Maintenance
  - Supplier Shipment Class Maintenance
- Demonstrate how to enter landed costs and disburse methods.

## Audience

Specific audiences will benefit from this course.

- AP Clerk
- Shipping and Receiving
- Purchasing Staff/Buyer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Shipping and Receiving Course** - This course discusses shipping and receiving, two processes that effectively move product to and from your location. This course covers how to set up your Epicor application properly to allow accurate shipping and receiving processing. Once this setup is complete, follow a sales order through shipping and follow a purchase order through receiving. You also learn about additional tools, such as reports and trackers, used with shipping and receiving.

## Pack Out

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Pack Out is a method of shipping in a grocery store style packing system. This methodology provides a fast and accurate system of tracking carton contents. In this course, you will create carrier manifest information and define shipping workstations and packaging information. Once setup is complete, you will use Pack Out to create and track a sales order.

Upon successful completion of this course, you will be able to:

- Describe how to use Pack Out as a shipping method.
- Explain the set up and use of Pack Out as a shipping solution.
- Use the Pack Out process flow from sales order to stage ship confirm.

## Audience

Specific audiences will benefit from this course.

- Shipping and Receiving
- Sales Manager

## Prerequisites

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- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Customers Course** - This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Computer and Internet Navigation Basics** - The application operates in a Microsoft Windows® environment; therefore, knowing how to navigate in a Windows environment and the Web will facilitate the training experience. Navigation tools you should be familiar with include computer hardware components such as the keyboard and mouse, navigation keys on the keyboard such as the Tab and Enter keys, and navigation buttons such as the Back button.



## Purchase Contracts

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This course is designed to introduce topics related to the Purchase Contracts process.

This course works with master files and configuration settings required to successfully operate the Purchase Contracts module.

Upon successful completion of this course, you will be able to:

- Set up suppliers.
- Create purchase delivery schedules and approvals.
- Describe purchasing configuration and master files.
- Set up and maintain a part and part schedule.
- Set up periodicity codes.
- Work with the purchase order entry process to create a contract purchase order.
- Use the generate purchase schedules process to create purchase schedule suggestions.
- Approve generated purchase schedule suggestions.

### Audience

Specific audiences will benefit from this course.

- Purchasing Staff/Buyer

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Suppliers Course** - This course covers the supplier record and the information located within Supplier Maintenance.

- **Recommended Industry Knowledge:** - Knowledge of supplier receipt delivery and purchasing, in general, is helpful in understanding this course.

## Purchase Management

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This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.

Upon successful completion of this course, you will be able to:

- Complete Purchase Management configuration and maintenance program setup, including adding suppliers and their price lists.
- Review ratings assigned to a supplier.
- Assign attributes to a supplier.
- Create purchase orders for job material, inventory, subcontract operation, and other material.
- Approve, duplicate, and receive purchase orders.
- Complete the purchase requisitions creation and approval.
- Manage purchase order suggestions and purchase contracts.
- Use Supplier Relationship Management (SRM) functionality to complete the Request for Quote (RFQ) for job-related and quoted material.
- Utilize Landed Cost functionality.
- Analyze purchasing data through reports and trackers.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- Purchasing Staff/Buyer
- Account Manager
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Suppliers Course** - This course covers the supplier record and the information located within Supplier Maintenance.
- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.

## Purchase Requisitions

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This course describes how to use the purchase order requisition process to eliminate obsolete paper systems. A requisition record includes actions necessary to approve a requisition. These actions can include price and specification approval, as well as supervisor notification. Actions such as price and specification approval are often mandatory, while supervisor notification can be for information purposes only.

Upon successful completion of this course, you will be able to:

- Describe requisition requirements.
- Enter a requisition.
- Approve a requisition.

## Audience

Specific audiences will benefit from this course.

- Shipping and Receiving
- QA Inspector
- Purchasing Staff/Buyer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

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transactions. Your organization may have more complex processing routines than those described in this course.

- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Suppliers Course** - This course covers the supplier record and the information located within Supplier Maintenance.

## RMA Processing

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This course introduces the concept of customer returns and reviews the primary functions of the Return Material Authorization (RMA) process. This course graphically traces the flow of information through the RMA process, followed by a demonstration of RMA processing and disposition. In addition, you will review related functionality to the overall RMA process.

Upon successful completion of this course, you will be able to:

- Trace the information flow through the RMA process.
- Explain process and disposition RMAs.
- List where an RMA is visible within the application.
- Describe the RMA interface.

## Audience

Specific audiences will benefit from this course.

- QA Inspector
- Order Entry Staff
- Customer Service Representative

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Quality Assurance Course** - This course discusses the flow of material through the Quality Assurance (QA) module and reviews the configuration and maintenance setup. This course addresses various inspections and demonstrates how the Epicor application processes them.

## Serial Number Tracking

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This course provides an overview of the serial number functionalities within the Epicor application. Using hands on workshops this course teaches serial number masking, formatting and generation.

Serial number tracking allows unique identification for each item you use in manufacturing or receive into inventory from manufacturing or purchasing. Serial number tracking meets a very strict standard for product identification. Information captured for each serial number aids in specifying products for recall and help identify defect sources.

Upon successful completion of this course, you will be able to:

- Define the parameters used for serial number generation at the company and the site level.
- Explain how to create a mask that defines the way serial numbers are formatted by part and site.
- Generate serial numbers at the component level to connect parent and child assemblies for tracking.
- Match, reassign and follow a serial number for warranty or service follow-up.

### Audience

Specific audiences will benefit from this course.

- Cost Accountant
- Shop Floor Manager
- Scheduler
- Shipping and Receiving
- Production Manager
- Engineer

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.

## Shipping and Receiving

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This course discusses shipping and receiving, two processes that effectively move product to and from your location. This course covers how to set up your Epicor application properly to allow accurate shipping and receiving processing. Once this setup is complete, follow a sales order through shipping and follow a purchase order through receiving. You also learn about additional tools, such as reports and trackers, used with shipping and receiving.

The shipping process allows you to take existing inventory or manufactured products and distribute them to customers or other facilities within your organization. This process is structured to be a seamless method that enables your product to reach customers and other facilities.

The receiving process enables you to receive stock goods, manufacturing materials, or subcontract work back to your location. The first step in this process is to create a purchase order for the service or product needed. **Receipt Entry** provides flexibility in coordinating with suppliers' delivery schedules. This ensures that the service purchased is received to the right area of your organization.

Upon successful completion of this course, you will be able to:

- Identify the concepts of shipping and receiving.
- Set up and utilize shipping and receiving functionality.
- Summarize the entire process flow of receiving purchases and shipping products.
- Enter and ship a sales order.
- Create a mass shipment.
- Enter and receive a purchase order.
- Create a mass receipt.

### Audience

Specific audiences will benefit from this course.

- Shipping and Receiving
- QA Inspector

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Customers Course** - This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured

during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.

- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Suppliers Course** - This course covers the supplier record and the information located within Supplier Maintenance.

# Production Management

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## Advanced Material Management

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This course takes you through the features and functionality of the Advanced Materials Management (AMM) module.

Hands-on workshops guide you through this module.

AMM provides the ability to electronically process move requests between inventory and shipping staging or from receiving to inventory. It also allows you to allocate finished parts in work in process or inventory.

Upon successful completion of this course, you will be able to:

- Receive and inspect incoming material.
- Move finished products to inventory and purchase order receipts to inspection and to the job.
- Perform material replenishment tasks.
- Create sales order allocations using the Fulfillment Workbench.

## Audience

Specific audiences will benefit from this course.

- Shop Floor Managers
- Job Planners
- Buyers
- Material Managers
- Production Managers
- Schedulers
- Project Team Leaders

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.



- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Manufacturing Execution System Course** - This course discusses the Manufacturing Execution System (MES), an easy-to-use, online application that allows you to enter labor and inventory transactions while work is done on the shop floor.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Inventory Management Course** - This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.

## Advanced Production Management

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This course discusses how Advanced Production Management allows the user to batch operations for efficiency and produce multiple parts on a single job as co-parts. The course focuses on how to batch operations at the beginning of a job to achieve efficiency and how to create a job that produces more than one product.

Upon successful completion of this course, you will be able to:

- Describe how Advanced Production Management is used.
- Batch operations and produce multi parts on a single job as co-parts.

### Audience

Specific audiences will benefit from this course.

- Scheduler

### Prerequisites

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interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Manufacturing Execution System Course** - This course discusses the Manufacturing Execution System (MES), an easy-to-use, online application that allows you to enter labor and inventory transactions while work is done on the shop floor.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Inventory Management Course** - This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.

## Advanced Planning and Scheduling (APS)

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This course discusses Advanced Planning and Scheduling (APS) and how it incorporates the strength of the scheduling engine and enhances it with advanced functionality. While these features add to scheduling, it may be necessary to use additional functionality such as multiple constraint scheduling. APS includes a wide range of additional scheduling methods, visual drag-and-drop scheduling, capability and dependent capability-based scheduling, real-time capable-to-promise functionality, and advanced material planning functionality.

This course is designed to guide you through the features and added functionality that comes with APS. It focuses on creating capabilities, working with material constraints, learning capable-to-promise (CTP) and multi-level CTP functionalities, scheduling capabilities and multiple resources on jobs, and using multiple research tools to view the scheduling results. Such tools include scheduling boards and load graphs. The learning objectives will be accomplished through presentation and workshops.

Upon successful completion of this course, you will be able to:

- Identify the functionality available within the Advanced Planning and Scheduling module.
- Create and use capabilities.
- Use material constraints in job scheduling.

- Use capable-to-promise and multi-level CTP functionalities.
- Initialize and view Resource Schedule Load graphs.
- Generate and review scheduling reports.

## Audience

Specific audiences will benefit from this course.

- Scheduler
- Engineer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Scheduling Course** - This course introduces the theory of scheduling and the use of the scheduling tools in the Epicor application. The objective is to provide a foundation using the application to achieve realistic production schedules and load estimates that can be used to help control the shop floor and aid in delivery promises. The Scheduling Course focuses on creating job schedules, computing resource loads, and communicating this information to stakeholders.
- **Engineering Course** - This course outlines the creation of a new part, engineering of a method of manufacture (MOM), approval of a method, and creation of a method available for use. Methods can be used in the quoting process, job entry, or as the basis for a new method.
- **Recommended Industry Knowledge** - Students should have a working knowledge of job scheduling and capacity planning concepts.

## Engineering

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This course outlines the creation of a new part, engineering of a method of manufacture (MOM), approval of a method, and creation of a method available for use. Methods can be used in the quoting process, job entry, or as the basis for a new method.

Upon successful completion of this course, you will be able to:

- Describe where engineering can occur throughout the Epicor application.
- Identify configuration and setup requirements.
- Describe the engineering process flow.
- Use the Engineering Workbench to create and modify parts, revisions, MOM, and sales kits.

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Shop Floor Employee
- Shop Floor Manager

- Scheduler
- Production Manager
- Engineer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.

## Enhanced Quality Assurance

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This course discusses advanced functions in the Epicor application that ensure better coverage of a part. Through the enhanced Quality Assurance module you can create inspection plans using inspection attributes and specifications and apply them through the inspection data entry process. The inspection plan launches the Configurator Designer to define the data required to be captured and configure the input sheets for data entry.

The EQA course workshops guide you through the inspection process. This course covers how to create inspection plans, input sheets in the Configurator Designer, inspect received parts, use skip lot codes, and record calibration information.

Upon successful completion of this course, you will be able to:

- Create inspection attributes and specifications.
- Link the attributes and specifications to an inspection plan.
- Create test plans using the Configurator Designer.
- Receive purchased items into inspection.
- Disposition items to stock or a job.
- Receive returned materials and dispose through inspection.
- Determine rules on what frequency parts are to be inspected at the time of receipt.
- Record calibration information against a resource.

## Audience

Specific audiences will benefit from this course.

- Shop Floor Employee
- Shop Floor Manager
- Shipping and Receiving
- QA Inspector
- Production Manager
- Engineer

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Inventory Management Course** - This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.
- **Quality Assurance Course** - This course discusses the flow of material through the Quality Assurance (QA) module and reviews the configuration and maintenance setup. This course addresses various inspections and demonstrates how the Epicor application processes them.
- **Configurator Course** - This course introduces you to the general Configuration process and the use of functionalities used to create configurations.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Recommended:** Industry knowledge in inventory control, work order material management, and quality control production.

## Handheld

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This course discusses the Handheld functionality in the Epicor application. This is an easy-to-use, online application that allows you to enter labor and inventory transactions using handheld RF (Radio Frequency) devices while work is performed on the shop floor. Transaction entry is rapid and straight forward with the use of a touch-screen, light-pen, or bar coding technology.

Upon successful completion of this course, you will be able to:

- Identify module configuration settings pertinent to the Handheld functionality.
- Clock in and out for the day.

- Log in and out of a job.
- Navigate through the handheld device screen and the available functions.
- Perform shop employee tasks such as viewing the work queue and issuing material, using handheld devices.
- Start and end setup and production activity.

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Shop Floor Employee
- Shop Floor Manager
- Production Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

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## Job Management

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This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.

Upon successful completion of this course, you will be able to:

- Identify configuration and setup requirements for the Job Management module.
- Use the job planning process for the Make To Order and Make To Stock environments.
- Process jobs through the Epicor application, including engineering, performing initial scheduling, releasing, and printing the job traveler.
- Change specific job requirements.
- Issue materials and adjust job costs.
- Receive finished goods to stock and complete the job.
- Analyze job performance.
- Use the planning and processing functionality for lean manufacturing.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- COO/Operations Manager
- Production Manager
- Customer Service Representative
- Account Manager
- Sales Representative

## Prerequisites

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- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.

## Job Splits

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This course covers job splitting manufacturing scenarios.

Upon successful completion of this course, you will be able to:

- Describe job split functionality.
- Identify when a job split can be used.
- Describe the effects of job splits on job costs.
- List tips and suggestions for job split processing.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant

- CFO/Controller
- COO/Operations Manager
- Shop Floor Employee
- Shop Floor Manager
- Scheduler
- Production Manager
- Engineer

## Prerequisites

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## Kanban

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This course explains the concept behind Kanban, provides an overview of the required setup, and identifies how Kanban is applied within the Epicor application.

Upon successful completion of this course, you will be able to:

- Set up the kanban types you need for your manufacturing process.
- Define Kanban Values on Part Records.
- View future demand to dynamically calculate future replenishment kanban records with the manufacturing flow kanban.
- Reduce on-hand inventories as parts are electronically triggered for replenishment as needed with real-time manufacturing kanban records.
- Enter a Kanban Receipt.

## Audience

Specific audiences will benefit from this course.

- Shop Floor Employee
- Shop Floor Manager
- Production Manager



## Prerequisites

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- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels in the Epicor application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor 9.05 application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Inventory Management Course** - This course provides an overview of the inventory management process. Use this module to update and maintain raw materials, work in process (WIP), as well as finished goods inventory quantities and costs.

## Manufacturing Execution System

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This course discusses the Manufacturing Execution System (MES), an easy-to-use, online application that allows you to enter labor and inventory transactions while work is done on the shop floor.

The MES provides accurate labor reporting, which is a vital concern in job costing and job status. Online transaction tracking gives management a current picture of what occurs on the shop floor by employee and by job. Because the MES is integrated with Job Management and Scheduling, the latest shop floor scheduling issues are always available.

This course reviews the clock in, work queue review, material issue, start and end activity, and clock out processes that shop employees use MES to perform. Workshops guide you through these processes.

Upon successful completion of this course, you will be able to:

- Identify module configuration settings pertinent to the MES.
- Clock in and out for the day.
- Log in and out of a job.
- Navigate through the MES screen and the functions available.
- Perform shop employee tasks in the MES, such as viewing the work queue and issuing material.
- Start and end setup and production activity.

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Shop Floor Employee
- Shop Floor Manager
- Production Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

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## Material Requirements Planning

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This course is designed to teach the primary functions of the Material Requirements Planning (MRP) module, including the process flow. In addition to the primary functions, this course reviews related functions such as how to establish forecasts and master production schedules. Use Material Requirements Planning to both estimate potential demand and propose the supply that answers this demand.

This course begins with a review of the MRP system configuration and the part maintenance file setup. The emphasis of this course is on the MRP process - running MRP on a scheduled basis and firming up jobs for production. Processes that relate to MRP (such as purchasing suggestions and cycle counting) are then reviewed along with applicable reports and trackers. Hands-on workshops create the opportunity to see the MRP functionalities.

Upon successful completion of this course, you will be able to:

- Identify factors that affect material requirements planning.
- Determine setup requirements.
- Use different scenarios to process MRP.
- Create a forecast for a part.
- Create a master production schedule.

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Scheduler
- Shipping and Receiving
- Production Manager
- Purchasing Staff/Buyer

## Prerequisites

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- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Inventory Management Course** - This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.

## Methods of Manufacturing

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This course defines the role of a method of manufacturing (MOM), its composition, and the impact it has on scheduling and costing outputs.

The MOM defines how to build a part or an assembly. It has two components, the bill of material (BOM) and the bill of operation (BOO). These components are discussed in depth to better understand the impact each has on production, scheduling, and job costing.

Upon successful completion of this course, you will be able to:

- Define a method of manufacturing and describe its purpose.
- Describe components of a method.
- Identify the elements associated with each component.
- Illustrate how the method impacts scheduling and costing output.

## Audience

Specific audiences will benefit from this course.

- Cost Accountants/CFO
- Engineers
- Schedulers

- Shop Floor Managers
- Production Managers

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.

## Quality Assurance

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This course discusses the flow of material through the Quality Assurance (QA) module and reviews the configuration and maintenance setup. This course addresses various inspections and demonstrates how the Epicor application processes them.

The course workshops guide you through the inspection process. This course covers how to dispose failed material, return material to the supplier, and use report tools available in the QA module.

Upon successful completion of this course, you will be able to:

- Describe the material flow through the QA module.
- Configure the QA module options.
- Identify part classes, suppliers, and items that require inspection.
- Receive purchased items into inspection and disposition the items to stock or jobs.
- Move job material or job assemblies to inspection for analysis and disposition.
- Identify non-conforming material and move material to the Material Review Board (MRB) for analysis and disposition.
- Receive returned material from a customer and dispose of it through inspection.
- Evaluate quality information through reports and trackers.

## Audience

Specific audiences will benefit from this course.

- Shipping and Receiving
- QA Inspector

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Inventory Management Course** - This course provides an overview of the entire inventory management process. Use this module to update and maintain raw materials, work in process (WIP) as well as finished goods inventory quantities and costs.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- Industry knowledge in inventory control, work order materials management, and quality control production.

## Scheduling

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This course introduces the theory of scheduling and the use of the scheduling tools in the Epicor application. The objective is to provide a foundation using the application to achieve realistic production schedules and load estimates that can be used to help control the shop floor and aid in delivery promises. The Scheduling Course focuses on creating job schedules, computing resource loads, and communicating this information to stakeholders.

Upon successful completion of this course, you will be able to:

- Understand scheduling in a manufacturing environment.
- Apply scheduling features available in the Epicor application.
- Understand scheduling options.
- Use the application to help create realistic production schedules and load estimates.

## Audience

Specific audiences will benefit from this course.

- Production Control
- Material Planning
- Operations
- Scheduling
- Engineering

## Prerequisites

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- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Engineering Course** - This course outlines the creation of a new part, engineering of a method of manufacture (MOM), approval of a method, and creation of a method available for use. Methods can be used in the quoting process, job entry, or as the basis for a new method.
- **Industry Knowledge** - A working knowledge of job scheduling capacity planning concepts.

# Sales Management

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## Case Management

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This course is an overview of the Case Management module, which provides a customer-focused solution needed for personalized, high-quality service. This comprehensive one-stop solution enables your service team to manage current case load and respond quickly to customers for industry leading customer satisfaction.

By using this module, employees are able to manage the whole Case Management process as well as automate many administrative tasks.

This course begins with a review of the Case Management system configuration and maintenance program setup. The emphasis of this course is directed toward the module's main features.

Hands-on workshops provide students with the opportunity to experience the power of Case Management.

Upon successful completion of this course, you will be able to:

- Configure Case Management module options.
- Use Case Management maintenance programs.
- Create and resolve a Case Management case.
- Update tasks associated with a Case Management case.
- Assign topics to a Case Management case.
- Use Task List and Knowledge Base Inquiry to search and view data related to Case Management cases.

## Audience

Specific audiences will benefit from this course.

- Sales Manager
- Order Entry Staff
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Recommended Industry Knowledge** - Students should be familiar with other sales and service related processes, such as Quote Entry, Order Entry, Return Material Authorizations (RMA), and Field Service.

## Configurator

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This course introduces you to the general Configuration process and the use of functionalities used to create configurations.

Typically, a configurable product has several characteristics, which can have different selectable values. For example, when you choose a configurable product in a sales order, the possible characteristic selections for the product automatically display at item level. You can choose the characteristic values you want and so determine a specific attribute for the configurable product. The Configuration process facilitates ordering items with complex requirements and a variety of options, and enables on-the-fly configuration of highly customizable and dimensional products when creating quotes, sales orders, purchase orders, jobs or demand orders.

This course provides a foundation for using the Configuration process related programs to create a rules base and input rules. These enable users to design configure-to-order items based on customer input or selections. It also focuses on how to set up the universal method and rules base, and execute these rules to achieve unique product designs.

Upon successful completion of this course, you will be able to:

- Define a rules-based system by creating a rules base and input rules. This enables users to design configure-to-order items while creating a quote, sales order, purchase order, job or demand order. This includes the following:
  1. Adding fields to a user input form, format the fields to accept only desired data, and test the input form prior to assigning rules.
  2. Defining the various rule types.
  3. Using rules to select items or operations to include in a quote or job.
  4. Using formulas to calculate material quantity and operation run times.
  5. Testing the inputs and rules to determine proper functioning.
  6. Creating a quote for a configured assembly.
- Explain module features and their usage for definition of unique product configurations.
- Manage the Configurator Designer interface and its use with other modules, including Order Management, Quote Management, and Job Management.
- Create a configured subassembly using the same inputs as the parent assembly.
- Create a Document rule.
- Configure import and export functionality.
- Utilize additional features such as smart elements and quote pricing based on selected inputs.
- Define pricing for the entered inputs.



## Audience

Specific audiences will benefit from this course.

- Sales Manager
- System Administrator
- IT/Technical Staff
- Product Designer
- Product Engineer
- Production Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Engineering Course** - This course outlines the creation of a new part, engineering of a method of manufacture, approval of a method, and creation of a method available for use. Methods can be used in the Quote, Order, and Job Management modules.

## Customer Pricing

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This course discusses the pricing features within the Epicor application. The Epicor application uses a pricing system that gives you flexibility when determining prices. You can establish procedures to create and maintain prices for company products using the pricing features.

Upon successful completion of this course, you will be able to:

- Manage customer pricing strategies.
- Use quantity based pricing.
- Use order value based pricing.
- Establish a customer price list.
- Create a price list for a product group.
- Work with Price Inquiry.

## Audience

Specific audiences will benefit from this course.

- Sales Engineer/Pre-Sales
- Account Manager

- Sales Representative

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Customers Course** - This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.

## Customer Relationship Management

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This course describes the Customer Relationship Management (CRM) module and how it provides straightforward, effective tools for managing common sales and marketing processes. The CRM module provides the environment to track prospects and quickly convert those prospects into satisfied customers.

By using the CRM module, salespeople can manage the prospect-to-customer life cycle, provide accurate revenue forecasts to management, and automate many administrative tasks. This module assists marketing activities by helping to develop effective marketing lists, campaigns, and campaign events, while providing powerful metrics that allow organizations to make the most of these activities.

This course begins with a review of the CRM system configuration and maintenance program setup. The emphasis of this course is directed toward the main features of the module, including marketing, management, and the complete sales process.

Hands-on workshops give students the opportunity to experience the power of CRM.

Upon successful completion of this course, you will be able to:

- Configure CRM module options.
- Use CRM maintenance programs.
- Define marketing campaigns and events.
- Generate marketing lists for marketing events.
- Manage the sales process by establishing quotas, maintaining tasks, and realigning territories.
- Identify the salesperson's role in the quote-to-order process.
- Accurately generate, track, and analyze leads and marketing activities using the CRM tool set.
- Track the history of a sale from the initial lead, opportunity, or quote to the order.

## Audience

Specific audiences will benefit from this course.

- Sales Manager
- Order Entry Staff

- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Recommended Industry Knowledge**- Students should be familiar with other sales and service related processes, such as Quote Entry, Order Entry, Return Material Authorizations (RMA), and Field Service.

## Demand Management

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This course discusses how the Demand Management module handles the creation, analysis, editing, and reconciliation of cumulative records for order releases from your customers.

This course is designed to review the concepts, processes, and reporting of the Demand Management (DM) module. Discussions introduce you to the fundamental setup of master files, information impacting Demand Management processes, the programs for Demand Contract Entry and Demand Entry used to define and manage contracts as well as release schedules. This course also looks at Demand Mass Review used to evaluate the impact of demand lines and shipping schedules as well as Demand Reconciliation used to update releases to reflect changes that occurred during shipping.

Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Analyze the features and functionality available in the Demand Management module.
- Configure the related file setup.
- Identify additional demand parameters in the Customer Maintenance program.
- Define Periodicity and the impact of the available options.
- Specify customer contracted parts in Contract Entry.
- Retrieve demand lines from the contract to generate demand.
- Generate a shipping schedule for current demand.
- Use additional functions used to review demand and match new and existing releases.
- Reconcile quantity variances on demand contracts.
- Enter demand information through Electronic Data Interchange (EDI).

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Production Manager
- Sales Manager
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Customers Course** - This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Methods of Manufacturing Course** - This course defines the role of a method of manufacturing (MOM), its composition, and the impact it has on scheduling and costing outputs.
- **Parts Course** - This course introduces the building blocks that make up Part Maintenance. It focuses on the importance of Part Maintenance, required maintenance program setup, key fields, manufactured and purchased part setup, and commonly used reports and trackers.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.

## Multi-Company Configurator

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This course is an extension of the Configurator course and demonstrates how to use Product Configurator Designer in a multi-company environment. Workshops guide you through key steps in using multi-company functionalities.

Upon successful completion of this course, you will be able to:

- Set up and configure external companies.

- Create a global, non-stock part.
- Build a method of manufacturing for the global part.
- Create a Configurator ID and input screens.
- Add Method rules for a configured part.
- Run the Multi-Company Server and Enterprise Configurator Server processes.
- In the Sales company, link the configured part synchronized in the Manufacturing company to a part record within the Sales company.
- In the Manufacturing company, create a job for the configured part.

## Audience

Specific audiences will benefit from this course.

- Sales Manager
- System Administrator
- IT/Technical Staff
- Product Designer
- Product Engineer
- Production Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels within the application - application, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow of information through your application. It starts with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer. Invoice processing, cash receipts, and generate supplier payments are also discussed.
- **Part Course** - This course introduces the building blocks that make up Part Maintenance, the cornerstone of the ERP application. This course focuses on the importance of Part Maintenance, required maintenance program setup, key fields in Part Maintenance, set up of manufactured part and purchased parts, and review of commonly used reports and inquiries.
- **Engineering Course** - This course outlines the creation of a new part, engineering of a method of manufacture, approval of a method, and creation of a method available for use. Methods can be used in the quoting process, job entry, or as the basis for a new method.
- **Configurator Course** - This course covers Configurator Management, an application module designed to facilitate ordering items with complex requirements and variety of options. Configurator Management enables on-the-fly configuration of highly customizable and dimensional products.
- **Multi-Company Course** - This course reviews a multi-company environment's setup steps, concepts, processes, reports, and trackers. Topics include multi-company functionality setup, global record maintenance, multi-company journals, inter-company trading, central payment transactions, and consolidation.

## Order Fulfillment (Allocation)

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This course is designed to take you through the Order Fulfillment functionality in the Fulfillment Workbench.

Hands-on workshops guide you through this module.

The Fulfillment Workbench reserves or allocates material to **Sales Orders**, **Job Orders**, or **Transfer Orders**. This functionality is valuable when you want to satisfy demand material quantities through jobs or stock in a sequence that matches allocation priorities assigned to your customers.

Upon successful completion of this course, you will be able to:

- Browse open sales orders based on a series of comprehensive user-specified search criteria.
- Reserve material quantities for selected sales orders.
- Allocate inventory to sales orders using pre-defined allocation templates or using manually entered ad-hoc allocation parameters.
- Automatically generate cross-docked transactions.
- Release selected, allocated orders to the Material Queue for order-based picking in the warehouse.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- AR Clerk
- COO/Operations Manager
- Payroll Staff
- Shop Floor Employee
- Shop Floor Manager
- Scheduler
- Shipping and Receiving
- QA Inspector
- Production Manager
- Engineer
- Purchasing Staff/Buyer
- Sales Manager
- Order Entry Staff
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels within the application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. Whether items are shipped from stock or from work in process, a shipping transaction is performed. Shipping transactions are captured during invoicing in the Accounts Receivable module, creating financial transactions that ultimately post to the general ledger. Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Part Course** - This course introduces you to the building blocks that make up Part Maintenance, the cornerstone of the ERP application. It course focuses on the importance of Part Maintenance, required maintenance program setup, key fields in Part Maintenance, set up of a manufactured part and a purchased part, and review of commonly used reports and inquiries.
- **Inventory Management Course** - This course provides an overview of the inventory process. It demonstrates the steps required to update and maintain raw materials, as well as finished goods inventory quantities and costs.
- **Manufacturing Foundation Course** - Manufacturing Foundations is designed to introduce you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Manufacturing Execution System (MES) Course** - This course discusses the Manufacturing Execution System (MES), an easy-to-use, online application that allows labor and inventory transactions to be entered while work is done on the shop floor. Transaction entry is straight forward and rapid with the use of touch-screen, light-pen, or bar coding technology, in addition to the traditional keyboard and mouse.

## Order Management

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This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.

This course explores both basic and advanced order entry processes, discusses additional related functionality, pricing, and discounting processes, and reviews pertinent reports and trackers. Workshops guide you through related programs in the Order Management module.

Upon successful completion of this course, you will be able to:

- Use the features and functionality available in the Order Management module.
- Set up related maintenance programs and company configuration for the Order Management module.
- Enter different types of sales orders including a quick sales order, a sales order with multiple releases, a customer part cross-reference sales order, a counter sales order, and a sales order with linked jobs.

- Use the Job Manager and the Order Job Wizard to link jobs to sales order lines.
- Pull quote lines into a sales order.
- Ship and invoice a sales order.
- Use the pricing and discounting features and functionality in the Epicor application.
- Use the applicable reports and trackers.

## Audience

Specific audiences will benefit from this course.

- Shipping and Receiving
- Sales Manager
- Order Entry Staff
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative

## Prerequisites

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- **Quote Management Course** - This course uses three scenarios to cover the quoting process: make-to-stock, make-to-order, and engineer-to-order.
- **Customers Course** - This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.
- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.

## Quote Management

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This course uses three scenarios to cover the quoting process: make-to-stock, make-to-order, and engineer-to-order.

Upon successful completion of this course, you will be able to:

- Use the features and functionality available in the Quote Management module.
- Perform the related maintenance program setup and company configuration settings for the Quote Management module.



- Create quotes using several business case scenarios including make-to-stock, make-to-order, and engineer-to-order.
- Identify and use the various Quote Entry sheets and fields.
- Retrieve manufacturing details on a quote.
- Modify manufacturing details on a quote.
- Use the Quote Worksheet to determine selling prices based on a markup percentage.
- Utilize Quote Markup functionality.

## Audience

Specific audiences will benefit from this course.

- Production Manager
- Engineer
- Sales Manager
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative

## Prerequisites

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- **Customer Relationship Management Course** - This course describes the Customer Relationship Management (CRM) module and how it provides straightforward, effective tools for managing common sales and marketing processes. The CRM module provides the environment to track prospects and quickly convert those prospects into satisfied customers.
- **Customers Course** - This course introduces fundamental concepts pertaining to the creation of customer records. This course also covers various maintenance programs necessary to define a customer in the Epicor application.

## Sales Kitting

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This course begins with creating new parts and moves on to engineering a sales kit component listing along with approving a complete sales kit and checking it in for use. Sales kits can be used by quotes and then sold, and components of a sales kit can be purchased or manufactured.

This course covers the settings of a sales kit part, how to create a sales kit, and how to use a sales kit in the Epicor application.

Hands-on workshops will guide users through the sales kitting process.

Upon successful completion of this course, you will be able to:

- Define sales kits and their components.
- Create sales kits in the application.
- Utilize the features associated with sales kits.
- Use sales kits in the quote-to-cash workflow within the application.

## Audience

Specific audiences will benefit from this course.

- Account Manager
- Sales Engineer/Pre-Sales
- Sales Representative
- Sales Manager
- Engineers
- Estimators
- Shipping Managers
- Shipping Clerks

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

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- **Engineering Course** - This course outlines the creation of a new part, engineering of a method of manufacture (MOM), approval of a method, and creation of a method available for use. Methods can be used in the quoting process, job entry, or as the basis for a new method.
- **Parts Course** - The Parts course introduces the user to the building blocks that make up the cornerstone of ERP software, the Part Master file. This course focuses on the importance of the Part Master file, required subsidiary file setup, key fields in the part master, set up of a manufactured part and a purchased part, and review of commonly used reports and inquiries.
- **Recommended Knowledge: Computer and Internet Navigation Basics** - The application software operates in a Microsoft Windows® environment; therefore, knowing how to navigate in a Windows environment and how to navigate on the Web will facilitate the training experience. Navigation tools users should be familiar with include computer hardware components such as the keyboard and mouse, navigation keys on the keyboard such as the Tab and Enter keys, and navigation buttons such as the Back button.

# Service Management

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## Field Service

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This course introduces the Field Service module. This module is designed for people who install, repair, or service offsite or company sites. Use Field Service to centralize all processes that relate to dispatching technicians and reporting service call costs. The Field Service module supports the drop shipment of service parts directly to the customer site. It is configured for a single interface, so a dispatcher can track each stage of a service call.

This course reviews the required setup for the **Company Maintenance, Field Service, and Job Management** modules. Hands-on workshops guide you through processes that involve warranty parts, service contracts, and service calls.

Upon successful completion of this course, you will be able to:

- List the setup steps necessary to use the Field Service module.
- Create service contracts.
- Add a service contract to a sales order line.
- Enter and manage service calls.
- Invoice a service contract directly in AR Invoice Entry.
- Manually or automatically renew a contract about to expire.
- Generate quotes for contract renewals.
- Add and remove items on a contract once it has been invoiced.

## Audience

Specific audiences will benefit from this course.

- Sales Manager
- Order Entry Staff
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various

transactions. Your organization may have more complex processing routines than those described in this course.

- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Deferred Revenue Accounting Course** - This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools that relate to the Deferred Revenue Accounting module.

## Introduction To Project Management

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This course discusses basic Project Management functionality necessary to execute a single level project.

Project management allows you to organize and plan the manufacture of projects that need to be controlled at different levels. As a result, you can create, monitor, and complete simple and complex manufacturing projects successfully.

Upon successful completion of this course, you will be able to:

- Define basic project details.
- Create work breakdown structure (WBS) phases.
- Assign related job and sales order to a project.
- Use the Build Project Analysis process to analyze project costs.
- Bill a project.

## Audience

Specific audiences will benefit from this course.

- Production Manager
- Sales Manager
- Project Manager
- Consultants
- General Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager

at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Required Course: Navigation**

This course introduces navigational aspects of the application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels within the application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.

- **Recommended Course: Manufacturing Foundations**

Creating an efficient manufacturing foundation is crucial because it defines how jobs flow through the application and how costing is applied to those jobs. In addition, this foundation will determine your shop capacity and provide the backbone for scheduling. This course is designed to introduce you to the principle building blocks in establishing a strong manufacturing environment with your manufacturing application.

- **Recommended Course: System Flow**

The System Flow course introduces you to a basic quote to cash scenario, including the basic processes necessary from the customer quote up to final cash receipts and payment of supplier invoices. This session emphasizes the series of processes in the program that make up the quote to cash scenario. Bear in mind that this session uses a very simple scenario to highlight the various transactions. Your organization may have more complex processing routines than those described.

## Maintenance Management

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This course provides a clear perspective of the maintenance programs, concepts, processes, and reporting tools you encounter as you work with the Maintenance Management module.

Upon successful completion of this course, you will be able to:

- Identify the key maintenance programs that directly impact maintenance cycles.
- Process Maintenance Management service requests.
- Understand the Maintenance Management approval process.
- Create maintenance jobs.
- Update meter readings for equipment.
- Manage maintenance service plans.
- Understand the reports and trackers that are important to review in order to maintain the Maintenance Management integrity.

## Audience

Specific audiences will benefit from this course.

- COO/Operations Manager
- Shop Floor Employee
- Shop Floor Manager
- Scheduler
- Shipping and Receiving
- QA Inspector
- Production Manager

- Engineer
- Purchasing Staff/Buyer
- Order Entry Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels in the Epicor application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Scheduling Course** - This course introduces the theory of scheduling and the use of the scheduling tools in the application. The objective is to provide a foundation using the application to achieve realistic production schedules and load estimates that can be used to help control the shop floor and aid in delivery promises. The Scheduling Course focuses on creating job schedules, computing resource loads, and communicating this information to stakeholders.
- **Inventory Management Course** - This course provides an overview of the inventory process. It demonstrates the steps required to update and maintain raw materials, WIP, as well as finished goods inventory quantities and costs.
- **Recommended: Advanced Scheduling** - This course discusses Advanced Planning and Scheduling (APS) and how it incorporates the strength of the Scheduling engine and enhances it with advanced functionality. While these features add to Scheduling, it may be necessary to use additional functionality such as multiple constraint scheduling. APS includes a wide range of additional scheduling methods, visual drag-and-drop scheduling, capability and dependent capability-based scheduling, real-time capable-to-promise functionality, and advanced material planning functionality.
- **Recommended: Executive Dashboard Course** - This course explores the Business Activity Queries (BAQ), Executive Queries, and process sets building processes necessary for Executive Dashboard data organization and data visualization. Workshops throughout the course demonstrate the Executive Dashboard creation processes.
- **Recommended: Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Recommended: Shipping and Receiving Course** - This course discusses shipping and receiving - two processes that effectively move product to and from your location. The shipping process allows you to take existing inventory or manufactured products and distribute them to customers or other facilities within your organization. This process is structured to be a seamless method that enables your product to reach customers and other facilities.

## Project Billing - Cost Plus

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This course reviews the **Project Billing - Cost Plus** functionality including the concepts and reporting tools in the Project Management module. Topics of discussion include maintenance program setup, project billing processes, and how to recognize the impact these processes have on a project. Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Identify key maintenance program configurations used to set up Project Billing.
- Recognize the relationship between Project Management and Project Billing.
- Identify the functionality and different uses of Project Billing invoice options.
- Create a project using the Cost Plus Project Billing invoice method.
- Generate and analyze invoices based on different invoice options.

### Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AR Clerk
- COO/Operations Manager
- Shop Floor Manager
- Scheduler
- Production Manager
- Engineer
- Sales Manager
- Order Entry Staff
- Account Manager

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Project Management Course** - This course covers how to accomplish a specific goal through a series of interrelated tasks and effective utilization of resources, such as people, time, and money.

- **Sales Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Time and Expense Management Course** - This course reviews the **Time Management** and **Expense Management** modules used to enter and manage employee labor hours and expense.
- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).
- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Project Billing - Fixed Fee

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This course reviews the **Project Billing - Fixed Fee** functionality including the concepts and reporting tools in the Project Management module. Topics of discussion include maintenance program setup, project billing processes, and how to recognize the impact these processes have on a project. Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Identify key maintenance program configurations used to set up Project Billing.
- Recognize the relationship between Project Management and Project Billing.
- Identify the functionality and different uses of Project Billing invoice options.
- Create a project using the Fixed Fee Project Billing invoice method.
- Generate and analyze invoices based on different invoice options.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AR Clerk
- COO/Operations Manager
- Shop Floor Manager



- Scheduler
- Production Manager
- Engineer
- Sales Manager
- Order Entry Staff
- Account Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Project Management Course** - This course covers how to accomplish a specific goal through a series of interrelated tasks and effective utilization of resources, such as people, time, and money.
- **Sales Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Time and Expense Management Course** - This course reviews the **Time Management** and **Expense Management** modules used to enter and manage employee labor hours and expense.
- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).
- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Project Billing - Progress Payments

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This course reviews the **Project Billing - Progress Payments** functionality including the concepts and reporting tools in the Project Management module. Topics of discussion include maintenance program setup, project billing processes, and how to recognize the impact these processes have on a project. Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Identify key maintenance program configurations used to set up Project Billing.
- Recognize the relationship between Project Management and Project Billing.
- Identify the functionality and different uses of Project Billing invoice options.
- Create a project using the Progress Payments Project Billing invoice method.
- Generate and analyze invoices based on different invoice options.

### Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AR Clerk
- COO/Operations Manager
- Shop Floor Manager
- Scheduler
- Production Manager
- Engineer
- Sales Manager
- Order Entry Staff
- Account Manager

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Project Management Course** - This course covers how to accomplish a specific goal through a series of interrelated tasks and effective utilization of resources, such as people, time, and money.

- **Sales Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Time and Expense Management Course** - This course reviews the **Time Management** and **Expense Management** modules used to enter and manage employee labor hours and expense.
- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).
- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Project Billing - Time and Materials

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This course reviews the **Project Billing - Time and Materials** functionality including the concepts and reporting tools in the Project Management module. Topics of discussion include maintenance program setup, project billing processes, and how to recognize the impact these processes have on a project. Throughout the course, hands-on workshops guide you through these topics.

Upon successful completion of this course, you will be able to:

- Identify key maintenance program configurations used to set up Project Billing.
- Describe the relationship between Project Management and Project Billing.
- Identify the functionality and different uses of Project Billing invoice options.
- Create a project using the Time and Materials Project Billing invoice method.
- Generate and analyze invoices based on different invoice options.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- AR Clerk
- COO/Operations Manager
- Shop Floor Manager

- Scheduler
- Production Manager
- Engineer
- Sales Manager
- Order Entry Staff
- Account Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- **Project Management Course** - This course covers how to accomplish a specific goal through a series of interrelated tasks and effective utilization of resources, such as people, time, and money.
- **Sales Order Management Course** - This course discusses the Order Management module and how it facilitates the flow of manufactured items from inventory or jobs to the customer. A shipping transaction is performed whether items are shipped from stock or from work in process (WIP). Shipping transactions are captured during invoicing in the Accounts Receivable (AR) module, creating financial transactions that post to the general ledger (GL). Order entry and shipping are directly affected by the nature of the product and the process, specifically whether the items are built-to-order or shipped from stock.
- **Purchase Management Course** - This course focuses on the Purchase Management process. This process includes the creation and approval of purchase orders (POs) and requisitions, managing suppliers and their price lists, working with purchase order suggestions, and monitoring the purchase order process using related reports and trackers. The advanced functionality in the Supplier Relationship Management and Purchase Contract modules also aids in managing purchase orders.
- **Job Management Course** - This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.
- **Time and Expense Management Course** - This course reviews the **Time Management** and **Expense Management** modules used to enter and manage employee labor hours and expense.
- **Accounts Payable Course** - This course is designed to review the concepts and reporting tools available in the Accounts Payable (AP) module. Topics of discussion include maintenance program setup and the creation and payment processes for various invoice types. This course also describes how AP invoices and payments impact the general ledger (GL).
- **Accounts Receivable Course** - This course reviews the Accounts Receivable (AR) module's concepts and reporting tools. Topics of discussion include maintenance program setup, various AR processes, and how to recognize the impact these processes have on the general ledger (GL). Throughout the course, hands-on workshops guide you through these topics.

## Project Management

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Project management allows you to organize and plan the manufacture of large capital projects that need to be controlled at different levels. Project management enables you to create, monitor, and complete complex manufacturing projects successfully.

This course reviews the project management flow in the Epicor application. Topics include phase and task entry in Project Entry, Microsoft® Project® integration with other Epicor application programs, project analysis to analyze costs and performance, and finally, project progress monitoring with the Project Tracker.

Upon successful completion of this course, you will be able to:

- Understand the purpose and features of project management.
- Learn Project Entry's main functionality.
- Create parent and child WBS Phases.
- Link jobs, sales orders, purchase orders, quotes, and tasks to a project.
- Use the Build Project Analysis process to build and calculate project costs.
- Use the Job Scheduling Board to determine the estimated and actual project schedule.
- Assign checklist tasks and monitor each task's progress and status.
- Define milestones to create project billing.
- Generate milestones and the final billing for a project.
- Use the Project Tracker to track a project.
- Review the import and export features with Microsoft Project.

### Audience

Specific audiences will benefit from this course.

- Production Manager
- Sales Manager
- Project Manager
- Consultants
- General Manager

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Required Course: Navigation**

This course introduces navigational aspects of the application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels within the application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.

- **Recommended Course: Job Management**

This course describes the features and functionality of the Job Management module. Job Management provides a comprehensive manufacturing control system designed for routing, scheduling, costing, and tracking custom or repetitive parts produced for inventory or shipped to the customer from the site floor.

- **Recommended Course: Manufacturing Foundations**

Creating an efficient manufacturing foundation is crucial because it defines how jobs flow through the application and how costing is applied to those jobs. In addition, this foundation will determine your shop capacity and provide the backbone for scheduling. This course is designed to introduce you to the principle building blocks in establishing a strong manufacturing environment with your manufacturing application.

- **Recommended Course: System Flow**

The System Flow course introduces you to a basic quote to cash scenario, including the basic processes necessary from the customer quote up to final cash receipts and payment of supplier invoices. This session emphasizes the series of processes in the program that make up the quote to cash scenario. Bear in mind that this session uses a very simple scenario to highlight the various transactions. Your organization may have more complex processing routines than those described.

- **Recommended Industry Knowledge**

- Basic understanding of project management concepts and terminology
- Experience with the Microsoft Project application
- General knowledge of the manufacturing process flow
- Familiarity with the functionality of the current release of the Epicor application

## Time and Expense Management

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This course reviews the **Time Management** and **Expense Management** modules used to enter and manage employee labor hours and expense.

Upon successful completion of this course, you will be able to:

- Identify the company configuration and maintenance programs that relate to time and expense management.
- Explain the process and transaction flow of time and expense entry and approval.
- Enter time for projects and indirect labor.
- Enter unit-based expenses.
- Enter expenses for a different currency.
- Approve submitted time and expense transactions.
- Reject time and expense transactions.
- Update rejected time and expense transactions.

## Audience

Specific audiences will benefit from this course.

- Cost Accountant
- CFO/Controller
- AP Clerk
- COO/Operations Manager
- Payroll Staff

- Shop Floor Employee
- Shop Floor Manager
- Scheduler
- Production Manager
- Sales Manager
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

# Tools

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## Advanced Business Process Management

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This course focuses on advanced techniques users can leverage within Business Process Management (BPM). Epicor BPM identifies and improves processes to make customers business more efficient, more disciplined, and better able to adapt to change. BPM technology enables organizations to automate and streamline business processes for continuous improvement.

The BPM functionality is available on nearly every business process in the system and it activates using the Epicor Server. Whether the transaction originates from the Epicor Client or Epicor Web Services, the BPM results are the same. For this reason, Business Process Management is often the best toolset for system modifications. For example, making a field mandatory is easier to set up and maintain through a BPM method than a client customization.

The course first describes benefits using Business Process Management in a Service Oriented Architecture environment, followed by the general overview of BPM functionality. The course then follows by step-by-step case studies. Each case study explores a different aspect of the BPM functionality you can make use of in a real life environment.

Upon successful completion of this course, you will be able to:

- Understand benefits of a Service-Oriented Architecture.
- Get to know main principles of using BPM.
- Create an email template and use BPM to send notifications.
- Use the directive to default data in a newly added records.
- Control text properties using the C# programming.
- Create BPM forms invoked by method directives.
- Use Data Directives to initiate actions when updates to specific tables occur.
- Learn how to create and call Custom External Methods.
- Manage method directives.

### Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager



at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **Introduction to the Dashboard Course** - This course provides an introduction to the dashboard - a personalized information and a command center.
- **Business Process Management Course** - This course focuses on the Business Process Management (BPM). Using the BPM functionality, you can modify the flow of business processes through the Epicor ERP application. This allows individual companies to tailor the business flow to their specific requirements.

## Advanced Dashboards

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The advanced dashboard techniques discussed in this course provide flexibility with the way the data displays and functionality that allows you to access the data you need.

A dashboard is your personalized information and command center. It is a visualization tool that displays the current information and processes that help you perform your tasks more efficiently. The data you choose to display is refreshed periodically, so you are able to act on changes as they occur.

Set up the dashboard to match your needs. Spend some time thinking about the information that is helpful to you, then set up these queries through one of the available views, and link the processes that relate to this information. The dashboard becomes an efficient tool, as you are able to both view information and then act on it from one location.

It is expected that users taking this course have previous familiarity with the dashboard. This course does not review basic elements and functionality of the dashboard but focuses on advanced techniques not discussed in the Introduction to the Dashboard course.

Upon successful completion of this course, you will be able to:

- Create a new dashboard using existing queries.
- Modify dashboard properties to make it available as an advanced search.
- Add images to a new column in the current grid.
- Create an advanced search page on the dashboard and enable fields for searching.
- Add an advanced search with a range for searching for multiple records.
- Add a Dashboard Browse to the dashboard.
- Add multiple sheets with grids to the dashboard.
- Understand and create foreign key views and sub table views that display information from related tables on the dashboard.
- Build and deploy dashboards to the Main menu and Favorites bar.
- Create an updatable dashboard.
- Use the excel uptake and the publish view functionality.
- Create a mobile dashboard.
- Use Microsoft® SharePoint® to display dashboards.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff
- Project Team Leader
- Department Manager

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Introduction to the Dashboard Course** - This course provides an introduction to the dashboard - a personalized information and a command center.
- **Introduction to Customization Course** - This course explores the customization tools embedded within the Epicor application. Unlike personalization, users can customize a form and then make it available to multiple users in a company.
- **Business Activity Query Course** - This course introduces Business Activity Query (BAQ) Designer data extraction tool. It provides techniques for creating static Business Activity Queries (BAQs) as well as updatable BAQs. You can use both queries as the foundation for reports and dashboards, or to review specific details of your business.
- **SQL Server Reporting Services for Epicor ERP Course** - This course introduces Microsoft SQL Server Reporting Services (SSRS) reports and their implementation in Epicor ERP.
- **Required Industry Knowledge** - Fundamental knowledge of relational database concepts such as table relationships, records, and field types. An understanding of the functionality of the current release of the Epicor application.

## Advanced Embedded Customization

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Through this course you will explore customization techniques that go beyond the basics of text boxes and grids. It examines how to customize a program using the C# programming language, and it also introduces several wizards that help you generate custom C# code.

Through embedded customization, you can modify aspects of your interface and application functionality. You can then customize the Epicor application to meet the needs of specific users, your organization, or your industry.

Upon successful completion of this course, you will be able to:

- Identify the tools you use to create embedded customizations.
- Use the Form Event Wizard to create a routine and assign it to the appropriate event handler.
- Use the Sheet Wizard to embed a dashboard into a form.

- Use the Script Editor to evaluate the parts of a User Interface (UI) script and understand the appropriate placement for customized code entry.
- Understand common data objects and methods.
- Locate the methods and properties of a common business object in the Custom Object Explorer.
- Learn how to leverage Business Activity Query (BAQ) Zones to display data related to a selected field.
- Use Customization Maintenance to verify the controls and code associated with a specific customization.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff
- Managers
- Individuals responsible for improving the user experience for the Epicor application.

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Personalization Course** - This course covers how to personalize the Epicor application by adjusting the views, options, and toolbars to best suit your business needs. It also explains how to modify program interfaces to match your preferences.
- **Advanced Personalization** - This course shows you how to personalize your Epicor application in a way that best suits your company's needs. It introduces the changes you can make to the layout and content that does not affect the actual data or the application requirements. These features are specific to users with Personalization security privileges.
- **Embedded Customization Course** - This course explores the customization tools embedded within the Epicor application. Unlike personalization, users can customize a form and then make it available to multiple users in a company.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- Some of the material in this course addresses object oriented programming conventions and specifically, C# programming language syntax to author code. The following can be useful as additional study materials:
  - A general reference or text on Object Oriented concepts.
  - A language reference for C# programming.
  - Previous course work in .NET framework with an understanding of namespaces.
  - Additional information from Microsoft® Developer's Network.
  - The Epicor ICE Customization Guide available from your Customer Account Manager.

## Advanced Epicor Service Connect for Epicor ERP

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This course focuses on the advanced features of Epicor Service Connect and how to integrate it with the Epicor application.

Upon successful completion of this course, you will be able to:

- Import and test .NET assembly references.
- Perform advanced database operations.
- Access channel information in a workflow.
- Restore connectivity settings.
- Execute synchronous sub-workflows in batches to test system performance.
- Break sub-workflow execution.
- Use Business Logic Tester to explore a business object.
- Use Business Process Management to call Epicor Service Connect workflow.
- Create a customized view in Document Tracking.

### Audience

Specific audiences will benefit from this course.

- Engineer
- System Administrator
- IT/Technical Staff

### Prerequisites

In order to complete the workshops in this course, all necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important that you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **Business Process Management Course** - This course focuses on the Business Process Management (BPM). Using the BPM functionality, you can modify the flow of business processes through the Epicor ERP application. This allows individual companies to tailor the business flow to their specific requirements.
- **Epicor Service Connect 10 for Epicor ERP Course** - This course focuses on the main features of Epicor Service Connect and how to integrate it with the Epicor application. Service Connect is a powerful development tool that allows you to build workflows which can automate processes within an application or connect different business entities, applications, or users. It harnesses the power of XML and other open standards.

## Advanced Print Management

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Advanced Print Management (APM) is an integrated document management application that manages the capture, indexing, and output of business documents. Using Altec's doc-link™ application, APM is comprised of several modules that you can purchase based on your processes and needs.

In addition to the base Advanced Print Management module, the Advanced Print Management Plus and Advanced Print Management Web Management offerings are designed to extend the automatic routings to include enhanced features, such as archive document, search the repository, scan link, supplemental documents, and Web retrieval. Workshops guide you through basic APM and doc-link functionality.

Upon successful completion of this course, you will be able to:

- Use the basic features and functionality available in Advanced Print Management.
- Complete the set up the configuration of the Altec doc-link application.
- Practice creating Enterprise Report Management (ERM) printers, document types, recipients, routing lists, and other document management elements.
- Analyze the process involved in capturing, indexing, searching, retrieving, and routing documents using the doc-link application.
- Analyze the archiving and repository features in the Altec doc-link client.

### Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Crystal Reports Course** - This course introduces Crystal Reports®. It discusses how to use Crystal Reports and the Business Activity Query (BAQ) Report Designer to design and create reports as well as how to modify existing Crystal Report forms. In addition, this course reviews relational database concept fundamentals such as tables, table relationships, records, and field types.
- **Recommended: System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- General knowledge of the manufacturing process flow.
- Understand the functionality of the current release of the business software application.

- SQL script writing experience or familiarity.
- Familiarity with relational database concepts such as tables, table relationships, records and field types.

## Auto Print Control

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This course introduces using the Business Process Management (BPM) Auto Print data directive action to enable automatic report printing.

The course workshops demonstrate setting up auto print for an Epicor standard report in SQL Server<sup>®</sup> Reporting Services (SSRS) format and setting up auto print for Seagull Scientific BarTender<sup>®</sup> labels.

Upon successful completion of this course, you will be able to:

- Understand the purpose of the auto print functionality.
- Work with Business Process Management (BPM) data directives that includes the Auto Print action.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff
- Department Manager
- Project Team Leader

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.

### Recommended Industry Knowledge:

- Knowledge of your current Epicor application.
- Understanding of relational database concepts such as tables, table relationships, records, and field types.

## Build an Executive Dashboard

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This course explores the Business Activity Queries (BAQ), Executive Queries, and process sets building processes necessary for Executive Dashboard data organization and data visualization. Workshops throughout the course demonstrate the Executive Dashboard creation processes.

The Executive Dashboard gives you a visual representation of any aspect of your company's performance based on current application data. Create complex data views using the Executive Dashboard functionality, which display through multiple dimensions in both grid and graph formats.

This course uses the **ShopVision Sales Order Backlog Analysis** system dashboard to demonstrate the Executive Dashboard construction process.

Upon successful completion of this course, you will be able to:

- Understand the purpose of the Executive Dashboard.
- Learn the specific building terms of Executive Dashboards and Executive Queries.
- Understand how to create a process flow and data displaying process within an Executive Dashboard.
- Build a source Business Activity Query (BAQ) to query application data.
- Establish an initial Executive Query to schedule cube builds.
- Define the dimensions of the cube information buckets.
- Construct a Business Activity Query (BAQ) to query the cubes.
- Run the Executive Query to populate the cubes.
- Design and produce Data, Dimension, and Dimension Details Business Activity Queries (BAQs).
- Create and view the data on the Executive Dashboard.
- Build and deploy the Executive Dashboard to the Main menu for general use.

### Audience

Specific audiences will benefit from this course.

- Business Analysts
- System Administrator
- IT/Technical Staff

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Introduction to the Dashboard Course** - This course provides an introduction to the dashboard - a personalized information and a command center.

- **Advanced Dashboard Course** - This course shows you how to display information through a variety of Dashboard views using advanced techniques.
- **Business Activity Queries Course** - This course introduces the Business Activity Query (BAQ) Designer data extraction tool. It discusses data location concepts and provides an overview of query building techniques using the Query Builder, the Criteria Wizard, and the Calculated Field Wizard.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **Non-course Prerequisites:**
  - Exposure to other database query programs.
  - Fundamental knowledge of relational database concepts such as table relationships, records, and field types.
  - Understanding of the functionality of the current release of the Epicor application.

## Business Activity Queries

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This course introduces the Business Activity Query (BAQ) Designer data extraction tool. It discusses data location concepts and provides an overview of query building techniques using the Query Builder, the Criteria Wizard, and the Calculated Field Wizard.

Upon successful completion of this course, you will be able to:

- Use the field level technical help or the data dictionary viewer to locate the table and field criteria for use in a BAQ.
- Create a simple BAQ using the Query Builder and its query-building views.
- Construct an advanced BAQ comprised of several SubQueries.
- Use the Criteria Wizard to filter the data returned by the BAQ.
- Add calculated and aggregated values to a query using the Calculated Field Wizard.
- Design an updatable BAQ to increase team collaboration.
- Import or export queries between companies, or to a .xml or ASCII file type.

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- COO/Operations Manager
- Production Manager
- Account Manager
- Sales Representative
- System Administrator
- IT/Technical Staff



## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **Recommended Industry Knowledge:**
  - Fundamental knowledge of relational database concepts such as table relationships, records, and field types.
  - An understanding of the functionality of the current release of the Epicor application.

## Business Process Management

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This course focuses on the Business Process Management (BPM). Using the BPM functionality, you can modify the flow of business processes through the Epicor ERP application. This allows individual companies to tailor the business flow to their specific requirements.

The course provides an introduction to the fundamentals of the BPM application. It begins with discussion on how to set up a Tracing Log that captures all the calls the user interface makes to the server. When you activate this log, any business logic (BL) calls sent to the server are automatically recorded within this log. The Method Directives section includes an overview of method directive workflow elements - actions and conditions. You are provided with an understanding of the tool, as well as an opportunity to create a method directive. The Hold Type section of the course explains how to assign a status to a record and take appropriate action when being processed. You then learn how to apply a Data Directive to a specific table and trigger BPM execution using a database event. The course concludes with an overview of techniques you can use to manage BPM functionality of your Epicor ERP application.

The course includes examples that can be created with BPM, that require little or no programming knowledge.

The course format includes presentation, demonstrations, and hands-on workshops that enable you to quickly and efficiently learn Business Process Management basics in correlation with modifying the flow of processes in the application.

Upon successful completion of this course, you will be able to:

- Set up a Trace Log to review business logic calls triggered by your application activity.
- Understand the basic methods within a business object.
- Understand the features and functionality of Method Directives.
- Become familiar with the available workflow elements and corresponding User Texts.
- Use many of the pre-defined condition statements to define criteria that must be met before a method directive action can be performed.
- Initiate application tasks based on conditions defined in the Method Directive.

- Perform actions in a method directive based on BPM Hold Types.
- Comprehend the differences of the Pre-, Base, and Post-Processing directives.
- Apply a standard Data Directive on a table to execute an action after the data is saved to the database.
- Work with the dependent post process capability.
- Understand the impact of RowMod being set to Added, Updated, Changed, or Deleted.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Advanced Personalization** - This course will show you how to personalize the system in a way that best suits your company's needs and how to export these personalizations so that others can import the personalizations into their computers.
- **Embedded Customization** - This course explores the customization tools embedded within the Epicor application. Unlike personalization, users can customize a form and then make it available to multiple users in a company.

## Database Concepts

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This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.

A fundamental requirement when modifying or authoring custom reports or queries is to identify which tables within the database contain the needed data, and which field names are used to store that data. Hands-on workshops guide you through examples of each task.

Upon successful completion of this course, you will be able to:

- Explore table and field name identification methods, including Field Help, Customization Tools, and the Data Dictionary Viewer functionality.
- Identify relationships between parent and child tables and understand the linking processes and requirements.
- Display the Dataset Relationships Tracker to identify the fields to include in the join that links the selected tables.
- Define the available table join types of inner, left outer, and right outer joins.

## Audience

Specific audiences will benefit from this course.

- IT/Technical Staff
- System Administrators

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Recommended Industry Knowledge:**
  - Experience in other database generator programs.
  - Fundamental knowledge of relational database concepts, such as table relationships, records, and field types.
  - Understanding the functionality of the current release of the Epicor application.

## Embedded Customization

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This course explores the customization tools embedded within the Epicor application. Unlike personalization, users can customize a form and then make it available to multiple users in a company.

Through the customization tools, users can add/remove data elements, modify component properties, create custom C# code that runs before and after data field modifications, and other modifications that help better match the Epicor application with the requirements of your business or industry.

Hands-on workshops guide you through the customizations and help you understand the tools used to make these customizations.

Upon successful completion of this course, you will be able to:

- Understand the benefits of customizations for specific business requirements.
- Familiarize yourself with the customization tools.
- Use customization to hide fields, change properties of text boxes, and add interface elements.
- Use the Customization Form Wizards to add rules to make an action happen when a predefined condition is true and execute custom rules when a form opens or closes, and other key features.
- Review how foreign key views provide joins to link related tables together for display in a customization.
- Customize and deploy a user defined table from the Epicor application.
- Deploy customizations to companies and users.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Personalization Course** - This course covers how to personalize the Epicor application by adjusting the views, options, and toolbars to best suit your business needs. It also explains how to modify program interfaces to match your preferences.
- **Advanced Personalization Course** - This course shows you how to personalize your Epicor application in a way that best suits your company's needs. It introduces the changes you can make to the layout and content that does not affect the actual data or the application requirements. These features are specific to users with Personalization security privileges.

## Enterprise Search Administration

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This course describes how to set up and use Enterprise Search to search across the data in the Epicor application database.

Upon successful completion of this course, you will be able to:

- Perform simple and more advanced Enterprise Search queries.
- Enable the default Enterprise Search functionality for an Epicor installation.
- Customize search results by configuring Business Activity Queries (BAQs) and adding them to Enterprise Search.

## Audience

Specific audiences will benefit from this course.

- System administrator.
- BAQ designer.
- Managers.
- IT/Technical Staff.

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels in the Epicor application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements, Dataset Relationships Tracker features, and join type definitions and specifications.
- **Business Activity Queries Course** - This course introduces the Business Activity Query (BAQ) Designer data extraction tool. It discusses data location concepts and provides an overview of query building techniques using the Phrase Builder, the Criteria Wizard, and the Calculated Field Wizard.
- **Recommended knowledge** -
  - Familiarity with Epicor application installation process, servers, and components.
  - Experience writing Business Activity Queries (BAQs).

## Epicor EPM Performance Canvas 2009

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The Epicor EPM Performance Canvas course provides an introduction to Online Analytical Processing (OLAP) cubes, an overview of Business Intelligence (BI) and introduces the Epicor Enterprise Performance Management Performance Canvas (Performance Canvas) analysis platform for use with the Epicor Enterprise Performance Management (EPM) suite or as a standalone product.

Upon successful completion of this course, you will be able to:

- Describe basic OLAP and BI concepts.
- Create a web-based dashboard (canvas) using a generic datasource.
- Design a new canvas and customize slicers and gems.
- Explain the contents of each published EPM Content Pack.
- Perform specific analyses using existing gems, slicers, and canvases provided by the EPM Content Packs for an immediate return on your investment.
- Modify the analytical path of the pre-defined objects to meet your company's specific needs.
- Analyze the various deployment options.

## Audience

- System Administrator
- Business Analysts
- COO/Operations Manager
- CFO/Controller
- Sales Manager

- Account Manager
- Sales Representative
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **Epicor EPM Server and Cube Connect Course** - Although this course provides a basic overview of the Epicor EPM tools, a prior knowledge of EPM is recommended.
- **Working knowledge of Microsoft® SharePoint®**
- **Recommended Industry Knowledge: Microsoft® SQL Server Analysis Services® (SSAS)** - A knowledge of SSAS would be beneficial to understand some of the concepts presented in this course.
- **Recommended Industry Knowledge: Online Analytical Process (OLAP)** - Although this course provides a basic overview of the OLAP approach, an understanding of the OLAP technology and its multidimensional cube methodology is recommended.

## Epicor EPM Canvas Planning Course

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This course is designed to review the Epicor Enterprise Performance Management (EPM) Canvas Planning concepts as well as budgeting, planning, and reporting functionality the product provides. Topics of discussion include program installation options, basic setup, administration, and security. This course also describes standard budget and forecasting processes.

Epicor EPM Canvas Planning (Canvas Planning) is a flexible, scalable Microsoft Excel add-in that can handle large implementations across multiple installations, as well as manage mixed content from multiple sources.

Hands-on workshops guide you through the Canvas Planning Business Modeler setup steps to introduce the Canvas Planning processes.

Upon successful completion of this course, you will be able to:

- Create a unified financial and operational model for budgets, plans, and reports (set up the account plan, customers, business scenarios, and so on) using the Business Modeler.
- Manage dimensions in the EPM Canvas Planning Control Panel.
- Create and adjust dynamic reports using the Excel Planner.
- Create input forms your business needs in the Excel Planner.
- Load and export data using the Data Manager.
- Receive real time visualizations of business data and perform specific analyses.
- Analyze and update forecasts and budgets in a web interface.
- Build Canvases using Planning Gems to enter forecasts and visualize them.

## Audience

Specific audiences will benefit from this course.

- Executive
- Knowledge Worker
- CFO/Controller
- Analyst

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Epicor EPM Performance Canvas Course** - The Epicor EPM Performance Canvas course provides an introduction to Online Analytical Processing (OLAP) cubes, an overview of Business Intelligence (BI) and introduces the Epicor Enterprise Performance Management Performance Canvas (Performance Canvas) analysis platform for use with the Epicor Enterprise Performance Management (EPM) suite or as a standalone product.

The following industry knowledge is recommended:

- General knowledge of Microsoft Excel

## Epicor EPM Server and Cube Connect

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The Epicor Enterprise Performance Management (EPM) Server and Cube Connect course is designed to provide the system administrator with the tools to manage and deploy online analytical processing (OLAP) user cubes for use with the EPM suite of business intelligence tools. The EPM suite is considered a Cross Brand product in that it can use several of the Epicor applications, such as iScala, Enterprise, Clientele, and Epicor ERP as its datasource. This course has been written generically to provide steps that can be used with any of the Epicor applications. The course begins with a discussion of basic OLAP and multi-dimensional concepts and finishes with a cube modification and deployment project.

Upon successful completion of this course, you will be able to:

- Understand basic Online Analytical Processing (OLAP) concepts.
- Comprehend the Epicor EPM Platform structure and data flow behind the cube.
- Name the four components of Cube Connect and understand their interaction.
- Use the EPM Glossary Designer to create your own business definitions.
- Using the EPM Server Management Console to manage EPM cubes.
- Use the EPM Cube Editor application to create user cubes from a cube template.
- Deploy a customized user cube in EPM Cube Manager.
- Gain an understanding of the EPM Content Pack Editor and EPM Content Pack Deployer.
- Work with an EPM Cube within SQL Server Analysis (SSAS).

## Audience

Specific audiences will benefit from this course.

- CFO/Controller
- COO/Operations Manager
- Sales Manager
- Customer Service Representative
- Sales Engineer/Pre-Sales
- Account Manager
- Sales Representative
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.
- **Epicor Portal** - This course explores the creation of business views against the application data of major product lines. These views can be exposed through Microsoft® SharePoint web sites. Epicor Portal uses application schemas that predefine the links between application tables and present the view builder with simple documents that describe business entities, such as customers or sales orders. Epicor Portal allows you to make field selections for portal views without having to know the physical structure of the database. The views can also expose common business processes such as update addresses, submit sales orders, or log in support calls based on data provided in the views through Epicor Service Connect workflows.
- **Recommended Industry Knowledge: Microsoft® SQL Server Analysis Services (SSAS)** - A good understanding of SSAS is important to understand many of the concepts presented in this course.
- **Recommended Industry Knowledge: Online Analytical Process (OLAP)** - Although the course provides a basic overview of the OLAP process, an understanding of the OLAP functionality and its multi-dimensional cube methodology is recommended.

## Epicor Information Worker for Epicor ERP

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This course introduces Epicor Information Worker, an Epicor desktop productivity application that allows Microsoft® Office® users to view and update Epicor data. This enables individuals to increase productivity and improve real-time decision-making by leveraging Epicor data.

For many information workers, Microsoft Windows® and Microsoft Office are integral components of desktop productivity tools. At the same time, access to customers, products, suppliers, financial records, and employee information from Epicor is just as critical to business management. These two areas of information merged with Epicor Information Worker.



This course begins with a brief discussion of the application setup. The main focus of this course is to access data from the Epicor using Microsoft Outlook and then synchronize the data back to Epicor.

The course includes presentations, demonstrations, and a series of hands-on workshops designed to create and deploy Epicor Information Worker.

Upon successful completion of this course, you will be able to:

- Understand the features and functionality available in Epicor Information Worker.
- Access Epicor data from within Microsoft Office.
- Perform synchronization between Microsoft Office and Epicor records.

## Audience

Specific audiences will benefit from this course.

- Users of Microsoft Office applications
- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- Knowledge of Microsoft Office
- Knowledge of Epicor.

## Epicor Information Worker Administration for Epicor ERP

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This course reviews the Epicor Information Worker administrative side. Epicor Information Worker is a desktop productivity application that allows people who use Microsoft® Office® to view and update data from applications configured to work with Epicor Information Worker. This helps increase productivity and improve real-time decision-making by offering easy access to data stored in applications.

This course reviews required administrative configuration. The majority of the course explains the Epicor Information Worker Configuration Manager, followed by a section on troubleshooting data synchronization issues.

The Epicor Information Worker Configuration Manager is an application that configures Epicor application business activity queries (BAQs) so people who use Epicor Information Worker can access data in Microsoft Office applications via the Epicor menus and commands.

There are shipping configurations that come with Epicor Information Worker. However, an organization may want to create their own views and want them accessible in the Epicor Information Worker menu structure. The Epicor Information Worker Configuration Manager allows you to create a new configuration file which you can deploy to your Information Worker server.

Upon successful completion of this course, you will be able to:

- Understand Information Worker administration and the implications of different configurations.
- Use Information Worker Configuration Manager.

- Modify Information Worker configuration settings.
- Deploy a modified configuration.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

## Prerequisites

In order to successfully complete this course, the following prerequisites must be met.

- Experience with Epicor business activity queries (BAQs).
- Complete the Epicor Information Worker 9.05 for Epicor 9.05 course.

## Epicor Knowledge Mentor Author

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Epicor Knowledge Mentor (EKM) enables you to create, deploy, and manage custom training resources and documentation for your Epicor software. Through EKM, your organization can adapt to software faster, empower employees, and improve business performance.

Upon successful completion of this course, you will be able to:

- Create the content structure for a sample course, including lesson groups and associated projects
- Record content
- Create the book and pages
- Generate documents
- Edit content playback and lesson topics
- Use the collaboration tools
- Use EKM Instant Author

## Audience

Specific audiences will benefit from this course.

- Training developers
- Documentation writers
- Subject matter experts

## Prerequisites

In order to complete the workshops in this course, all necessary software and modules must be licensed and operating in your training environment, including Epicor Knowledge Mentor (EKM) Author, EKM Collaborator, and EKM Instant Author. For more information on the modules available, contact your Epicor Customer Account

Manager at **EpicorCAM@epicor.com**. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels in the Epicor application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.

## Epicor Service Connect for Epicor ERP

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This course focuses on the main features of Epicor Service Connect and how to integrate it with the Epicor application. Service Connect is a powerful development tool that allows you to build workflows which can automate processes within an application or connect different business entities, applications, or users. It harnesses the power of XML and other open standards.

Service Connect workflows use XML documents as the primary interface. The workflows are designed to send documents to, and use documents from exposed services of other applications, such as .NET Business Objects Epicor 10. Service Connect workflows primarily map structures to convert this data so information is ready to use by other processes.

By using the document as the interface, you can quickly integrate applications and processes into a **loosely coupled** environment. To insert a new routine or new piece of information into the process, it is quicker and easier to incorporate into a loosely coupled environment than into an environment built on traditional programming practices.

Service Connect is designed to fully leverage the Service Oriented Architecture (SOA) of other applications. You can set up Service Connect workflows themselves as services designed to consume and return information on demand. In that sense, you can use Service Connect to create its own SOA environment.

Upon successful completion of this course, you will be able to:

- Understand how Service Connect is built to support processes that connect different business entities, applications, and users.
- Understand data conversions and the purpose of an internal envelope.
- Become familiar with Service Connect services.
- Work with the Epicor Service Connect Administration Console to define connectivity processing options for Service Connect.
- Use the Workflow Designer to define workflows.
- Create conversions and use .NET methods to transform a set of data from a specific source format to a specific target format.
- Use different workflow elements, such as choice, poster, or task.
- Work with the Task Monitor.
- Become comfortable with the mapper tool to generate XSLT code the conversions use.
- Process an external file, such as a comma separated (.csv) text file or Microsoft® Office® Excel® (.xls) file, as input to Service Connect.
- Import .NET assembly references.
- Use the DBOperation element to run statements against the application database.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Knowledge Camp Course** - This course provides a high level overview of the quote to cash flow through the Epicor application. You begin with how to create a quote, process it as an order, and fill the order across production planning and purchasing. The course also covers the manufacturing plan and shipment of parts to a customer, as well as how to process invoices, enter cash receipts, and generate supplier payments.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.

The following industry knowledge is recommended:

- Basic understanding of the application file structure and how to manage data in your Epicor application.
- Experience with .NET assemblies, XML, XSLT, and SQL Server.
- Fundamental knowledge of relational database concepts such as table relationships, records, and field types.

## Epicor Social Enterprise

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This course introduces the Epicor Social Enterprise information networking tool. You will learn how you can use Epicor Social Enterprise to communicate with other Epicor ERP users and to follow changes to your business data as they occur in your Epicor ERP application.

Upon successful completion of this course, you will be able to:

- Open Epicor Social Enterprise from the Epicor ERP client and understand the features of the Epicor Social Enterprise Home page.
- Exchange messages with other users in the public message stream.
- Join public groups and exchange messages with other group members.
- Set up and follow notifications that post data notification messages informing you when changes of interest to you occur in your ERP data.
- Use the integration points in an ERP application program that enable you to post messages, display message activity, and set up to follow notifications in the context of a selected ERP data record.
- Use private messages and private groups to take communication with other users out of the public message stream.

- Use the Epicor Social Enterprise search utility to locate information in the message stream and ERP data.
- Monitor the message stream and post messages via email.

## Audience

Specific audiences will benefit from this course.

- All Users

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.

## Epicor Web Access

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This course presents Epicor Web Access functionality that enables browser-based access to the Epicor application.

Upon successful completion of this course, you will be able to:

- Understand the Epicor Internet Component Environment (ICE) technology basics.
- Become familiar with multiple user interfaces, including the smart client, Microsoft® Office® Client and web browser client.
- Understand the Epicor Everywhere™ Framework's main features.
- Become familiar with main aspects of the Epicor Web Access Implementation.
- Identify the programs required to perform the Application Setup.
- Learn how to run EWA using two different environments - Classic and Enhanced Menu.
- Explore available menu controls using both EWA styles.
- Generate a report using Epicor Web Access environment.
- Exclude a form from being displayed using Epicor Web Access environment.
- Generate a web form for a customized form.
- Generate a web form for a dashboard.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Embedded Customization Course** - This course explores the customization tools embedded within the Epicor application. Unlike personalization, users can customize a form and then make it available to multiple users in a company.
- **Introduction to the Dashboard Course** - This course provides an introduction to the dashboard - a personalized information and a command center.

## Global Alerts

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This course describes how you use both standard and custom global alert messaging. The workshops in this course demonstrate how you setup an alert, activate it, enter a record that triggers the alert, and review the resulting alert message.

Global alerts are email messages you activate to help specific users track data activity. You determine which alerts you want continuously monitoring data and who will receive the automatic email messages generated by the specific database activity. Besides the alert text, each automatic message can also have a short cut link. This link is a configuration settings file (.sysconfig) file that can be used to launch the Epicor application so it immediately displays the record which triggered the alert.

You can activate two types of global alerts. Standard global alerts are pre-defined messages you activate in Global Alert Maintenance. Use this program to determine who will receive this alert message. You can also set up a standard global alert to automatically add a memo to the record which triggered this alert; these memos help build a database history for the record. Custom global alerts are automatic messages you create through Business Process Management (BPM) data directives. You determine which table/column you want to monitor, the custom message sent in the email, and who receives the custom global alert.

By using both standard and custom global alerts, you can set up a complete automatic communication system. Individuals throughout your organization will then be better able to respond and resolve customer, supplier, and internal issues.

Upon successful completion of this course, you will be able to:

- Set up the application to send and receive global alerts.
- Activate standard global alerts for specific recipients.
- Activate standard global alerts for alert groups.
- Review global alert error messages.
- Create shortcut links.
- Create custom global alerts.

## Audience

Specific audiences will benefit from this course.

- System Administrators
- IT/Technical Staff
- Department Managers

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Setup and Management Course** - This course explores how you set up and manage the Epicor application. By understanding these tools, you control how users access and run the application as well as manage automatic processes and customizations.
- **System Flow Course** - This course introduces a basic quote to cash scenario that includes the process from the initial customer quote to final cash receipts and payment of supplier invoices. This course emphasizes the series of processes that make up the quote to cash process by using a simple scenario to highlight various transactions. Your organization may have more complex processing routines than those described in this course.
- Knowledge in Simple Mail Transfer Protocol (SMTP).

Depending on the business focus of your organization and/or department, the following courses may be of interest:

- **Manufacturing Foundations Course** - The Manufacturing Foundations course introduces you to the principal building blocks in establishing a strong manufacturing environment. This course discusses the necessary prerequisites involved with efficient production floor configuration.
- **Distribution and Supply Chain Management Foundations Course** - This course introduces the distribution capabilities of the Epicor application. A distributor is typically the middleman between the manufacturer and a product supplier. After a product is manufactured, it is shipped to a distributor. The distributor either ships the product to an inter-company location, such as a site, or sells the product to customers or retailers.
- **Financial Foundations Course** - This course introduces you to the maintenance modules and programs in the Epicor application that set the basis for the financial activities within your company.

## Introduction to the Dashboard

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This course provides an introduction to the dashboard - a personalized information and a command center.

You can create custom dashboards that display current information and the processes needed in to perform tasks more efficiently. The data you choose to display is refreshed periodically. This information is always current, and you can act on changes as they occur.

There are several standard dashboards included with the Epicor application for immediate use. This course, however, covers how to modify existing dashboards and create customized dashboards that display information you need.

Upon successful completion of this course, you will be able to:

- Understand the general purpose and functionality of dashboards.
- Identify the authorization requirements to design and modify dashboards.
- List the key features of dashboards.
- Add queries and modify the information displayed on dashboards.
- Display query results through grid, chart, and tracker views.
- Modify query results in grid and chart views, apply rules to data, and use the publish and subscribe functionality.
- Add a URL to a dashboard.
- Use Query Phrase Subscribers.
- Add a process link to a dashboard.
- Create a customized tracker.
- Export and import dashboard definitions.
- Use dashboards.
- Build and deploy dashboards to the Main menu and to the Favorites bar.

## Audience

Specific audiences will benefit from this course.

- Executives
- Managers
- Project Managers
- Business Analysts
- System Administrators

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Computer and Internet Navigation Basics Course** - The Epicor application operates in a Microsoft® Windows® environment; therefore, knowing how to navigate in a Windows environment and the Web will facilitate the training experience. Navigation tools you should be familiar with include computer hardware components such as the keyboard and the mouse, navigation keys on the keyboard such as the Tab and Enter keys, and navigation buttons such as the Back button.



## Introduction to Executive Dashboards

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This course demonstrates how to populate, view, and organize data on executive dashboards. The workshops in this course guide you through key steps in using executive dashboards.

Executive dashboards provide a high-level view of current data and a visual representation of each aspect of your company's performance. Data displays through multiple dimensions in both grid and graph formats, which you can refresh and reuse. Executive dashboards can be modified or printed as desired.

Upon successful completion of this course, you will be able to:

- State the purpose of executive dashboards.
- Identify application executive dashboards.
- Populate executive dashboards.
- Use the available data dimensions on executive dashboards.
- View dimension details on executive dashboards.
- Work with summary grids on executive dashboards.
- Analyze graphs and charts on executive dashboards.
- Print data viewed on executive dashboards.

### Audience

Specific audiences will benefit from this course.

- Executives
- Project Managers
- Business Analysts
- System Administrator
- IT/Technical Staff

### Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Introduction to the Dashboard Course** - This course provides an introduction to the dashboard - a personalized information and a command center.
- **Database Concepts Course** - This course reviews the table and field name identification process using Field Help, Customization Tools, and the Data Dictionary Viewer functionality. It also describes table linking procedures and requirements as well as join type definitions and specifications.

**Recommended Knowledge:**

- Exposure to other database query programs.
- Fundamental knowledge of relational database concepts, such as table relationships, records, and field types.
- Understanding of the functionality of the current release of the Epicor application.

## Performance Techniques Course

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The Performance Techniques course focuses on the techniques and system tools available to improve the performance of the Epicor application.

This course goes into deeper performance information, and is intended as a follow-up to the Performance Tuning course. The Performance Tuning course explores the standard metrics and system information Epicor representatives and customers gather to identify performance issues; this course contains information on the tools and techniques you can use to resolve these issues.

The course begins by describing some Windows tools that measure the performance of your system. The Performance Analysis of Logs (PAL) tool is a shareware program that evaluates server logs through a series of performance counters. This detailed report evaluates several areas of your system and displays alerts when logs exceed specific performance thresholds. Use this tool to generate a detailed report that will help you pinpoint the sources of slow system performance.

Then this course also explains how you set up tracing to locate deadlocks, define the allocation unit size, and locate locking and blocking. Become familiar with these system tests and tuning techniques. By identifying deadlocks, locking and blocking, and other system issues, you can achieve significant performance gains.

The course concludes with some application tips and tricks on how to efficiently run Sales Order Entry, Material Requirements Planning (MRP), and Business Activity Queries (BAQs). Use these techniques to prevent slow performance from occurring within the Epicor application.

Upon successful completion of this course, you will be able to:

- Review how to set up and use the Performance Analysis of Logs (PAL) tool.
- Run tests to locate and correct deadlocks.
- Run tests to identify and correct causes of locking and blocking.
- Learn how to modify the web configuration file.
- Review application tuning techniques for caching programs, Material Requirements Planning (MRP), and Business Activity Queries (BAQs).

## Audience

Specific audiences will benefit from this course.

- Epicor Consultants
- Epicor Partners
- Technical Support Specialists
- System Administrators
- IT/Technical Staff
- Department Managers

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Course** - Introduction to Epicor 10
- **Course** - Database Concepts
- **Course** - Business Activity Queries
- **Course** - Embedded Customization
- **Course** - Advanced Embedded Customization
- **Course** - System Setup and Management
- **Course** - System Administration
- **Course** - Performance Tuning

## Performance Tuning Course

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This course focuses on the standard evaluation and testing process Epicor representatives and customers must follow to determine potential sources of slow performance. Epicor has developed this process to more quickly identify and resolve performance issues.

The course begins by explaining common patterns for slow performance. These patterns are situations customers typically experience, such as everything is slow, specific users have slow performance, one program is slow, and so on. The course explains what often is the cause for these patterns and describes how you can test the issue. The course then details the sources of poor performance.

The rest of this course mainly explores the step by step testing process Epicor representatives (consultants, technical support technicians, and partners) must follow to identify the source(s) of performance issues. Because customers often state "everything is slow" on their system, this methodical testing process gives Epicor representatives a base from which to analyze issues. This section of the course describes the specific metrics to gather and the hardware/software items to evaluate before making recommendations.

Likewise if you are a network administrator, IT technician, and/or department manager responsible for performance at your customer organization, understanding what data to provide during this standard testing process will make better use of your time and resources. You can then more efficiently analyze whether the recommendations from the Epicor representative are cost effective for your organization.

The Performance Tuning course concludes by exploring some client and server testing scenarios. Use these scenarios to evaluate various aspects of a system to pinpoint what is causing slow performance. Please note these scenarios are intended as a place to start; more performance techniques may be required. These techniques and tips are described in the accompanying Performance Techniques course.

Upon successful completion of this course, you will be able to:

- Review common performance patterns and their potential solutions.
- Become familiar with the available performance tuning tools and resources.
- Learn the metrics testing process to efficiently evaluate system performance.
- Use the Performance and Diagnostic Tool to evaluate various areas of performance.
- Run baseline performance tests.
- Learn both client and server testing scenarios.

## Audience

Specific audiences will benefit from this course.

- Epicor Consultants
- Epicor Partners
- Technical Support Specialists
- System Administrator
- IT/Technical Staff
- Department Managers

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Course** - Introduction to Epicor
- **Course** - System Administration
- **Course** - System Setup and Management

## SQL Server Reporting Services for Epicor ERP

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This course introduces Microsoft SQL Server Reporting Services (SSRS) reports and their implementation in Epicor ERP.

Microsoft SQL Server Reporting Services (SSRS) is a server-based reporting platform that provides comprehensive reporting functionality for generating reports from SQL Server databases.

For creating custom reports, the workshops in this course uses Microsoft SQL Server Report Builder, which is a report authoring tool that allows the user to get started quickly in a Microsoft Office-like environment.

Upon successful completion of this course, you will be able to:

- Use the SSRS Report Manager management tool and the Report Builder authoring tool to create custom reports.
- Add custom SSRS reports to the Epicor ERP application menu system and retrieve them for viewing.
- Edit an Epicor ERP shipped SSRS report.
- Create a BAQ report and then use the Report Builder authoring tool to design an SSRS report layout for the report.
- Add an SSRS printer in the Epicor Client and print SSRS reports.
- Understand the report security resources available when working with custom and shipped SSRS reports in Epicor.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff
- Report Writers
- Business Analysts

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques are available at each of the interface levels in the Epicor application - system, module, and program. Workshops focus on each of these levels and guide you through each navigational principle introduced.
- **Recommended Industry Knowledge** -
  - Exposure to other reporting programs.
  - Knowledge of relational database concepts such as table relationships, records, and field types.
  - Understanding of the current release application functionality.

## Styling and Themes

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The Styling and Themes functionality gives you complete control over the look and feel of the entire user interface (UI). Set this tool to display a pre-built design or theme and access it from the options installed with the Epicor application. Use this tool to edit an existing theme and create a new theme.

Styling and Themes allows modification to items from three main categories – UI Roles, Component Role Settings, and Shared Object Role Settings. The differences between these categories are explained later in this course.

Upon successful completion of this course, you will be able to:

- Correctly configure the user rights and privileges to access Styling and Themes.
- Accurately import needed resources used in themes.
- Understand how to manipulate UI roles, component roles, and shared UI objects to create and edit themes.
- Apply filters to accurately deploy styles and themes.
- Use style tracking to effectively manage styles and themes.
- Deploy themes through Theme Maintenance.

## Audience

Specific audiences will benefit from this course.

- System Administrator
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **Personalization Course** - This course covers how to personalize the Epicor application by adjusting the views, options, and toolbars to best suit your business needs. It also explains how to modify program interfaces to match your preferences.
- **Recommended: Embedded Customization Course** - This course explores the customization tools embedded within the Epicor application. Unlike personalization, users can customize a form and then make it available to multiple users in a company.

## System Administration

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This course explores how Microsoft<sup>®</sup> SQL Server interacts with the Epicor application. Designed for database administrators, this course describes the SQL Server features administrators manage to run the Epicor application.

Upon successful completion of this course, you will be able to:

- Manage user account permissions on SQL Server.
- Register database servers and create databases.
- Create Epicor servers, application servers, and task agents.
- Manage modules licenses, country specific functionality (CSF) licenses, companies, users, and sessions.
- Understand how to set up SQL Server Replication.
- Define SSRS printers within the Epicor ERP application.
- Modify both client and server configuration files as needed.
- Review logs and events.

## Audience

Specific audiences will benefit from this course.

- Database Administrators
- IT/Technical Staff

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at EpicorCAM@epicor.com. It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Industry Knowledge** - Understand system administration processes and concepts.
- **Technical Knowledge** - Understand both the hardware and software required for computers to communicate over a network.
- **Microsoft SQL Server** - A working knowledge of MSSQL Server is useful; this course only explains how the Epicor application utilizes this system.

## System Setup and Management Course

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This course explores how you set up and manage the Epicor application. By understanding these tools, you control how users access and run the application as well as manage automatic processes and customizations.

You leverage several tools to configure the Epicor application so it reflects the structure of your organization and the requirements of your business. This course begins by setting up a basic user account, and then reviews configuration settings files and run time arguments. Configuration settings (.sysconfig) files contain parameters you can modify; these parameters then activate when a user logs into the client. Likewise, run time arguments are switches which launch alternate menus and processes (like automatic updates) when users log in.

If you use the Multi-Site module, the Epicor application can have multiple companies, and then each company can contain multiple sites. Use these features to reflect the structure of your organization. Through these management tools, you define how each company and site interacts with the modules licensed by your organization. Then on user accounts, you determine which users have access to each company and site. To further improve security, use the security tools. Through these management programs, you restrict user access to specific programs, processes, and fields.

Reports, processes, and executive dashboards can generate automatically through recurring schedules. You first create these recurring schedules on a system agent, and then users link a report or process to these recurring schedules. These processing tasks then activate automatically at times that work best for your organization - generating the data when its needed and when it can be most efficiently processed.

Lastly, users can modify the application through personalizations, customizations, and other tools. You can manage these custom modifications using a series of maintenance programs. Through the features on these programs, you can evaluate each modification, correct errors, and remove the modification. To complete the customization management options, you can use the Solution Management module to bundle together selected customizations, personalizations, BAQs, and other items and distribute them from one Epicor application server to another server.

Together these setup and management tools give you control over how your organization and users interact with the Epicor application. By leveraging these tools, you can maximize your investment in the application.

Upon successful completion of this course, you will be able to:

- Create a user account.
- Modify startup configurations on client machines.
- Learn how to configure companies and sites so they reflect the needs your organization and industry.
- Grant user access to companies and sites.
- Set up schedules that automatically generate data for reports and processes.

- Restrict user access to the ERP application through the security features.
- Manage customizations, personalizations, dashboards, help annotations, and other custom items in the Epicor application.
- Create solutions that combine various items for installation in other companies.

## Audience

Specific audiences will benefit from this course.

- System Administrators
- IT/Technical Staff
- Security Managers

## Prerequisites

To complete the workshops in this course, the necessary modules must be licensed and operating in your training environment. For more information on the modules available, contact your Epicor Customer Account Manager at [EpicorCAM@epicor.com](mailto:EpicorCAM@epicor.com). It is also important you understand the prerequisite knowledge contained in other valuable courses.

- **Interface Navigation Course** - This course introduces navigational aspects of the Epicor application's user interface. Designed for a hands-on environment, general navigation principles and techniques available in two user interface modes - **Classic Menu** and **Modern Shell Menu**. Workshops focus on each of these modes and guide you through each navigational principle introduced.
- **System Administration Course** - This course explores how Microsoft<sup>®</sup> SQL Server interacts with the Epicor application. Designed for database administrators, this course describes the SQL Server features administrators manage to run the Epicor application.



# 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>.