



Practical Technology Solutions

## Epicor® BPMs (Business Process Management)

BPMs are really cool! They're fast, reliable, and versatile. We like to think of BPMs as blocks of code that "sit" inside Epicor® waiting to be called into action. When called, a BPM can perform a wide range of duties. They can default fields, eliminate erroneous data, make fields required, auto-email, sync Epicor® to other environments, notify management for nearly anything you can think of, they can update or change massive amounts of data (similar to DMT), auto-format fields, and much, much more.

### Purchase Order Entry

**What we did:** When the user saves, the BPM checks to see if there is a Due Date for the purchase order. If there isn't, the BPM prevents the save and notifies the user that the Due Date is required.

**Q.** Why is it Helpful?

**A.** It guarantees the accuracy of your data. Do you have a field that's absolutely critical to your business? A BPM can ensure that this data is entered the first time, every time. In this case, there was a need to ensure that the purchase order line always contained a Due Date. If it was missing, the company would sometimes spend hours working through data and processes to figure out what the Due Date should have been; it cost them a lot of time and money. Much to their satisfaction, this BPM has ensured that they never have to do this again.

### Sales Order Entry

**What we did:** After the user clicks the "Ready to Process" checkbox, a BPM checks to see if any of the Order's line items have a discount greater than 20%. If one is found, an email is automatically sent to management for review.

**Q.** Why is it Helpful?

**A.** BPMs can send emails behind the scenes based on what's being saved/entered into Epicor®. Not only that, but the email can be incredibly detailed. In this case, the email gave management the Order Number, Line(s), the Customer's Name, the Order Entry Person, the Part, Unit Price, Date, etc. These details empowered management to make a decision right on the spot. Do you have a need to notify management of any particular event in Epicor®? A BPM might be the solution for you.

Checking the "Ready to Process" checkbox kicks off a series of processes. This is where the BPM is triggered to check the Order Lines for a discount greater than 20%.

The screenshot shows the 'Sales Order Entry' window for order 1000022. The 'Ready To Process' checkbox is checked. The 'Summary' tab is active, showing customer information for BARRIST and a summary of charges and discounts. The 'Order Lines' table is visible at the bottom.

OrderLine	Job Type	Part	Rev	Desc	Order Quantity	UOM	Open
1	Manufactured	TVG3333		Vizor, Gray	1.00	EA	✓
2	Manufactured	T60DC		T60 Drive Cad	1.00	EA	✓

Once the BPM identifies the line(s) that meet the criteria, the email is sent.

The screenshot shows the 'Sales Order Entry' window with the 'Detail' tab selected for line 1. It displays detailed pricing information, including a 25.00% discount and a total price of 56.25.

Order Quantity:	1 EA	Price Group:		Project ID...:	
Price Per:	/1	Pricing Quantity:	0	RMA/Line...:	0 0
Unit Price:	75.00	Less Discount:	-18.75	Rework:	<input type="checkbox"/>
CI Value:	0.000	Ext. Price:	75.00	PO Line:	
Discount %:	25.00	Misc:	0.00	Reference:	
Discount Amt:	18.75	Tax:	0.00	Need By:	
		Total Price:	56.25	Ship By:	
		Adv. Bill Bal:	0.00	Job Type:	Manufactured

Subject: Discount Over 20% - OrderNum: 1000022 for Barriston Eng

Order Number: 1000022

Entry Person: jchan

Order Date: 10/28/2014

Customer: Barriston Eng

Order Line	Disc	PartNum	Desc	UnitPrice	Qty	TotPrice
1	25.00%	TVG3333	<u>Vizor</u> , Gray	\$75.00	1	\$56.25
2	21.00%	T60DC	T60 Drive	\$100.00	1	\$79.00

Here we have the email. It was important to our customer that the email be formatted as if it were a report. Some extra code accomplished that.



## Sales Order Entry

**What we did:** When the user first adds an Order Line, the Sales Cat is automatically defaulted to “Products”.

**Q.** Why is it Helpful?

**A.** It sped up data entry. Do your users find themselves performing the same motions over and over again? A BPM can default any field in Epicor®. The vast majority of this company’s orders had a Sales Cat of “Products”, defaulting this selection saved users from entering it in every time. Defaulting fields in Epicor® can save you a substantial amount of time.



## Customer Shipment Entry

**What we did:** After the user checks the “Shipped” checkbox, an email is automatically sent to the customer contact to let them know that their order shipped.

**Q.** Why is it Helpful?

**A.** Let your customers know the moment that their order ships. This ability has been in high demand and PTS would be happy to do this for you. It’s important to note that we also added a checkbox to the Customer Maintenance screen called “Notify when Shipped.” Before sending the email, the BPM would verify that this checkbox is checked. This was done as some customers didn’t want to be emailed.



## Quote Entry

**What we did:** When the user saves on the Quote Entry screen, a BPM checks to see if the sales person entered a unit price lower than the target sales margin. If this is indeed the case, the BPM pops up a message notifying the user that this has occurred. The user is still allowed to save the record, but they are notified that they are under target before doing so.

**Q.** Why is it Helpful?

**A.** No one likes to sell a product at a price that's too low; this BPM helped to prevent that. Collaboration with this PTS customer brought about a formula that determined the target sales margin for all of their products. Using this formula, not only were we able to notify the sales person that the selling price is too low, but we updated them on the target margin percentage, and the absolute lowest price to meet that target.



## Customer Shipment Entry

**What we did:** After the user checks the "Shipped" checkbox, the BPM checks to see if the Ship Via for the shipment matches the Ship Via selected for the Order. If they don't match, management is notified via email that the Order was shipped using a different Ship Via than what was selected when the Order was put in.

**Q.** Why is it Helpful?

**A.** It helps adherence to correct business flows. It was very important to this company that the Ship Via selected when the Order was created was used when the Order was actually shipped. They understood that sometimes the Ship Via would have to deviate from what was put in for the order, but they wanted management to know each time this occurred.



## Case Entry

**What we did:** When a case is closed a series of actions kick off to close the case in Epicor®. Unfortunately, there is no single field that flags a case as closed. To remedy this we built a BPM that checks a User Defined checkbox (UD field) when the user closes a case.

**Q.** Why is it Helpful?

**A.** BPMs can automatically fill in and save values to your database. This opens the door to many possibilities. Once you identify what you want to track, and when you want to track it, the BPM will do the rest. This BPM provided data that the customer needed for reporting/dashboard purposes. Going forward, they can easily create reports or dashboards for open or closed cases.

## Attachments

**What we did:** Updated over 3K records in the attachments table. This customer needed to change their server name that held their JobNum attachments. As a result, their attachments no longer worked.

**Q.** Why is it Helpful?

**A.** BPMs can perform mass data changes. DMT can do this as well, but when the logic for updating a table gets tricky, we've found a BPM to be best suited for the task. In this case, the BPM had to go through each record in the attachments table and determine if a field started with a specific value (i.e. xFileRef.XFileName = "\\servername"). If the record was found, the BPM would change the value to its new value (i.e. "\\NEWservername").

## Sales Order Entry

**What we did:** After saving the Order record, a BPM would check to see if a "Drop Fee" was created. If not, the BPM would ask the user a Yes or No question, and act accordingly based on the user's answer.

**Q.** Why is it Helpful?

**A.** Epicor® 9 introduced the BPM Data Form. It is essentially a pop-up that asks the user a question (or a series of questions), and the BPM takes action based on the user's answer. In this case, the user would answer Yes or No to the "Drop Fee" question. If Yes is selected, the BPM would create the "Drop Fee" for the order.

Here we have the BPM Data Form. After saving in Sales Order Entry, this pop-up would display. Notice that the user is forced to answer Yes or No via the radio button. This ensures that the question has been answered, and not missed.





## Quote Entry

**What we did:** Immediately after entering in the Part, the BPM would go out and find the Quantity on Hand (QOH) for the Part and display it to the user in a pop-up.

**Q.** Why is it Helpful?

**A.** It provided better customer service. This extra piece of information quickly let the user know the direction to take when providing a quote. If the QOH was high, the user knew they could quote lower because of surplus.