Customers and Suppliers Overview

The Customers and Suppliers view is used to locate your in-house clients and the contacts you use to purchase inventory and other materials.

In this course we will explore the use of Search Criteria, [pause] implementing 'And', 'Or' and 'Not' variables in a search and the functions related to the 'More' and 'Options' buttons.

We will begin in the Customer View pane.

The 'Customers' option located in the 'Views' Pane opens the Customers view.

The top section allows you to enter search criteria.

These criterion help narrow in on a specific customer or customers.

The Results area displays the customers that match the criteria.

The column headings indicate which specific information will be shown.

Use the scroll bar at the bottom of the window to scroll left or right through the columns.

When 'Suppliers' is chosen, a similar screen displays.

Here you can choose a particular group of suppliers from the 'Look in' drop down list.

The available column headings can be viewed by using the scroll bar. [Search Criteria]

Two methods are available for moving the cursor directly to a field or option.

One is to use the mouse to point to the field then click in it.

The other, using a keyboard shortcut.   Any field or option name that has a letter underlined can be selected by pressing the 'Alt' key and the underlined letter.

To move the cursor directly to the 'Look in' dialog box; press the key combination 'Alt' 'l'.

Clicking on the drop down arrow [pause] shows the options available. 'All Customers' includes any customer on file regardless of their status.

When 'Look in' is changed to 'Operational Customers', a list of those eligible for sales transactions appears.

The 'Home branch' setting is used in multi-location or multi-site environments.

To search for customers, regardless of the branch they are assigned to, use the '(Any)' option.

The 'Find' dialog box is similar to a Google search engine. Text contained in any of the customer fields that have been set as Searchable can be entered.

The more text entered, the more precise the search results.

Press 'Enter' or 'Go' to execute the search.

Limiting the text entry [pause] produces broader results.

For example, if we enter 'baker' in the 'Find' field the results display.

It is located in the 'Name' field here, [pause] and on this record in the 'Address' column.

[Using 'AND', 'OR' and 'NOT']

Boolean operators 'And', 'Or' and 'Not' can be used in a search.

'And' is implied when two or more words are entered such as 'washington' and 'construction'.

The 'Or' and 'Not' operators must be entered in uppercase letters [pause].

Here we see a search that returns Customers with "washington" OR "construction".

The use of 'NOT' is to exclude data.

This search returns customers that have 'washington' in a search field but excludes any that contain the text 'construction'.

['More' and 'Options' Buttons]

The number of matches found at one time is determined by a system option for 'Customer search page size'.

When the number of matches found exceeds the setting, the 'More' button appears beside the 'Go' button.

Clicking on it [pause] causes the next 50 matching records to be displayed.

The 'More' button disappears once all records matching the criteria are in the results area.

Use the right-hand scroll bar to scan through the list of customers.

Use the 'Options' button to determine how matches are identified.

Select 'Match on
'Begins with'.

Customers with a searchable field that begins with the text are displayed.

The 'Begins with' option is stored and used going forward until changed by the user.

Click the 'Options' button again [pause] and choose 'Exact Match first, Full Search If No Match'. Best Practice is to use this option.

The results now include those customers that have an exact match with the text "baker" [pause] and those that same text elsewhere in a search field.

Searching your data for specific Customers and Suppliers is simple when you take advantage of the available location tools. Search for specific text or groups of text using the AND, Or and NOT operators. The More and Options buttons provide additional settings to easily manage locating and maintaining your accounts and vendors.

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Corporate Office	Latin America and Caribbean	Europe, Middle East and Africa	Asia	Australia and New Zealand
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int.104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298