



Importing Customer-Specific Employee Lists

Epicor can import employee lists for customers and if desired, the lists can contain passwords. An email with the user name and password will be sent to the address identified for each new account. If no password is defined, a generic password will be generated and emailed. Once created, passwords can be reset but they cannot be retrieved or viewed by anyone.

If using generic email addresses for employees, we recommend defining a consistent password for all employees, allowing the SystemAdmin (or Learning Admins) to easily communicate the username and passwords to each participating employee.

1. Customers must complete an excel template, field headings must be exactly as follows and must be the first row of the spreadsheet with detail rows immediately following. If you are not setting up passwords, then omit final column.

account_number	FirstName	LastName	Email	functional_area	work_no	Password
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- **account_number:** Customer's Epicor account number. You must include any leading zeros.
 - **FirstName:** Employee's first name, no special characters (-, ' etc...)
 - **LastName:** Employee's last name, no special characters (-, ' etc...)
 - **Email:** You do NOT need a unique email for each employee – you can have one general default and use that same email for all who do not have their own.
 - **functional_area:** Used exclusively to determine which messages employees will see in the Message Center on the LMS Home Page. You can group similar employees by adding the same functional area to each. If you select functional area ALL for all employees, by default all employees will see all messages.
 - All
 - Accounting
 - General / No Specific Area
 - Inventory / Purchasing
 - Management
 - Sales / Order Processing
 - System Administrator
 - **work_no:** Phone number (can use store phone number)
 - **Password** – Not mandatory, if not included eliminate this column before importing. Passwords must be at least 8 characters, must contain both alpha and numeric content. No two characters can repeat! (Password1 is in valid due to the letter s repeating). No special characters can be used.
2. Save the completed import spreadsheet as an Excel .CSV file and email it to education@epicor.com. You will be notified once the new users have been added.