BisTrack What's New Release 2023.1

There are a lot of exciting new features in the BisTrack 2023.1 release.

Select the tabs at the top of the screen to learn more about the enhancements and resources associated with this release.

You can return to this menu at any time by selecting Home.

When you finish reviewing the enhancements, select Resources for additional information.

Objectives

- Financial
- Rentals
- Warehouse
- Miscellaneous

Financial

Epicor Commerce

With this release, we gave our e-commerce store on the Magento platform a makeover.

Now you can customize your interface with default templates and tailored solutions.

Do not despair, the WebTrack store is still available, but the enhancements to the e-commerce store on Magento offer improved performance, a modern user interface, and the ability to customize features.

The enhancements to the Epicor Commerce functionality with BisTrack improve processes such as product search/lookup, customer messaging, quotes messaging, invoicing and credit notes, and product categories.

In addition, with the Web Track Portal integration, BisTrack users and their contractor customers can better manage invoicing and payments.

Avalara Rest v2

We created a new system option, Epicor Tax Connect version that updates the Avalara Rest v2 API.

When using the v2 version, the API will complete Avalara address validations and Avalara tax calculations.

Note that these changes are exclusively on the Avalara side.

There are no changes on the BisTrack side.

Epicor Financials

Along with the enhancements to Epicor Financials Shared Reporting, we added new columns for Goods Total, Tax, and Total Amount for Type: Supplier.

This improves the basic functionality for overall system use.

In addition, BisTrack will now process LMC Remittances to Epicor Financials.

Rentals

With the rental business growth across the industry, we enhanced this release with pricing capabilities, reporting, and inventory tracking improvements while maintaining a familiar order interface.

For example, we updated support for the time-based unit of measure rental rates calculations to enable you to quote accurately and price rentals based on your customer's timeframe.

For instance, hourly, daily, and weekly rates work together so that a four-day and two-hour rental automatically uses the daily rate first, then the hourly rate, for the total rental cost.

We added options to Document Control for sales order documents that support document printing for rental contracts.

These include features that annotate returned rentals on the rental contract when the customer returns the item and options to print or not print rental items on sales order documents.

Warehouse Management

BisTrack release 2023.1 includes several enhancements to Warehouse Management.

We created a system option: WMS: Auto release line for processing to automatically release sales orders, back orders, stock transfer, and back transfer lines at a Waiting for Stock status when processing Epicor Warehouse Management picking transactions.

This avoids the scenario where incoming picking transactions processing fails, requiring you to release lines for processing manually.

This new system option has override options at the branch, region, and division level based on the transaction branch.

We made it easier for locations running Epicor Warehouse Management to process supplier returns and remove system imbalances with a new system option: WMS: Stock in suspense inventory controlled by WMS.

The default setting is No.

In this case, Supplier returns update the stock-in-suspense inventory bucket.

Stock in suspense increases when adding products to supplier returns.

When the stock return is marked as Inventory Returned, stock in suspense decreases along with stock actuals.

Supplier returns in Epicor Warehouse Management-enabled branches will not update stock-in-suspense with the option set to Yes.

The system updates stock in suspense through stock adjustments generated by Epicor Warehouse Management.

Note: This system option is locked to prevent changing without consultation with Epicor Warehouse Management Support.

Before changing this option, you must review the inventory within the stock in suspense bucket and the statuses of open supplier returns.

To make warehouse management more efficient, we added work-order-on-the-fly functionality.

We set up BisTrack to automatically create a Remanufacturing type Work Order from WMS.

The process enables BisTrack to consume Inventory Adjustment transactions from WMS and automatically create and process a remanufacturing Work Order.

We created the Auto Release Line for Processing system option for order lines picked in WMS under System Options > Integrations > WMS to automatically update the sales order, back order, and back transfer, making it available for picking as the first part of the processing of the Epicor Warehouse Management transmission.

This avoids an error message and allows BisTrack to pick-confirm the transaction to match the confirmation in Epicor Warehouse Management.

We revised the Confirm Picked Up system option so that you can set it by branch giving better visibility into sales order processing with Epicor Warehouse Management.

When set to Yes at the branch level, it triggers the system to update the BisTrack sales order, back order, or back transfer when processing the OS TransactionType record from the EDIMajureDataInformation.

This setting enables the system to review the order lines that are in the WD TransactionType and, for each line, determine if there is a Waiting for Stock status that has not been released for processing.

If the system locates a line in this status, it updates the line to release it for processing.

Miscellaneous

Quick Ship

You no longer have to use external sources to shop for rates and manage shipping.

With this release, we created an embedded Quick Ship solution.

Quick Ship offers Rate Shopping at the time of quote, order, or shipment to keep your customers' shipping costs low and drive loyalty for your business.

Calculated freight automatically flows back to your ERP platform for automated freight charges invoicing.

This enhancement maintains the convenience of having your BisTrack customer and order information available for fast and efficient shipping and tracking.

Customer Address Lookup

You can now select a customer address using the Google Maps button.

When you select the button, Google Maps adds a map when configuring an address or entering a one-time address.

When you select a location using a text search, Google Maps puts a marker on the map at the selected location.

You can move the marker. However, doing so clears the search as you are now using the marker to select the location.

You can also place the marker or pin without a search.

When doing so, the marker location provides the latitude and longitude for the address, along with the street, city, state, and zip location, if available.

This is useful if you want to identify a specific location for delivery, such as a job staging area.

Phocas (EDA)

Epicor Data Analytics (EDA), powered by Phocas, helps companies turn their data stored in BisTrack into actionable insights.

With this release, we enabled EDA to use all your BisTrack data and turn it into deeper insights, giving non-technical users instant access to easy-to-read dashboards, lightning-fast grids, and detailed transaction information in just a few clicks.

Epicor Data Analytics is fully integrated with BisTrack, using your data to help you understand your business performance.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution— in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

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