



CRAWFORD
SOFTWARE

Part Inspection Flag in Epicor 10

Standard Epicor Processing

In standard Epicor there are two places to maintain the inspection required check box:

- Part Class
- Supplier

Any material purchased from that supplier or part class, the incoming inspection checkbox will be set on the purchase order line and the user will not be able to change it. The goods received will be received into inspection and must be dispositioned through the Inspection Processing transaction. If the inspection check box is not set at the supplier or part class, the user may still set the check box in the purchase order entry or purchase order receipt entry transaction.

The screenshot shows the 'Supplier Maintenance' window for 'Crawford Software'. The 'Inspection Required' checkbox is located in the 'Status' section and is currently unchecked. Other visible fields include 'Supplier Name', 'Currency', 'Language', 'Tax Authority', 'Group', 'Terms', 'Ship Via', and 'FOB'.

The screenshot shows the 'Part Class Maintenance' window for 'Raw Materials'. The 'Inspection Required' checkbox is located in the 'Part Class Maintenance' section and is currently unchecked. Other visible fields include 'Description', 'Buyer', 'Negative Quantity Action', 'Purchase Type Code', and 'Default Part Lead Time'.

Crawford Software Extended Functionality

Crawford Software takes the Epicor Incoming Inspection processing and extends the same functionality, to the individual part master.

Our solution adds two more levels of control, at the part central data or the part site data.

Part Data

When blank no changes to standard Epicor functionality.

When set to Optional, the incoming inspection flag on new purchase orders is defaulted to checked, but the user may change the value.

When set to Mandatory, the incoming inspection flag on new purchase orders is set, and the user may NOT change the value.

The screenshot displays the 'Part Maintenance' window for a part named 'CRAWFORD-SOFTWARE'. The interface is divided into several sections:

- Part Information:** Part name 'CRAWFORD-SOFTWARE', Description 'Crawford Software Raw Bar Stock', Type 'Sales Kit', and UOM Class 'Bar Stock'.
- Inventory, Sales, and Purchasing:** Primary UOMs 'BR' and 'FT', Sales UOM 'FT', and Purchasing UOM 'FT'. Sales Unit Price and Internal Price are both set to 0.00000 /1.
- Classification:** Group 'Component Parts', Class 'Bar Stock', and Warranty.
- Analysis and Reference:** HeadIam Analysis, Material Analysis, Reference Category, and Tax Category.
- Commodity and Origin:** HS Commodity Code, Supp Units Factor (1.00000000), and Country of Origin (None Selected).
- Weights and Volumes:** Unit Net Weight (0.00000 g), Unit Gross Weight (0.00000 g), Unit Net Volume (0.00000 GAL), and Mtl Burden Rate % (0.00000).
- Container and Shelf Life:** Per Container (0) and Shelf Life / Days (0).
- Global and Search:** Global Lock (Global, Inactive, PLM), Search (Crawford), and Hold.
- Incoming Inspection:** Incom. Inspection (Mandatory, Optional), Run Out, Web Saleable, Use Part Rev (checked), Constrained Material, Track Lots, Package Control Specific UOMs, Track Multiple UOMs, Track Serial Numbers, Consolidated Purchasing, Receipt Docs Required, Shipping Docs Required, and Sub Level Code (0).
- Default Site Parameters:** Costing Method (Std), Link to Contract, Non-Stock Item, Buy To Order, Quantity Bearing (checked), Drop Ship, Phantom BOM, MDPV (0), and Returnable Container.

Part Site Data

- When blank no changes to standard Epicor functionality.
- When set to Optional, the incoming inspection flag on new purchase orders is defaulted to checked, but the user may change the value.
- When set to Mandatory, the incoming inspection flag on new purchase orders created for the site is set, and the user may NOT change the value.
- The site level indicator is superseded by the indicator at the part master. Standard Epicor functionality is not replaced but augmented.

The screenshot displays the 'Part Maintenance' window in a software application. The window title is 'Part Maintenance' and it includes a menu bar (File, Edit, Tools, Actions, Help) and a toolbar. The main area is divided into several sections:

- Part Maintenance** (top tabs): Part, Accounting, Reporting, Integrations, Attributes.
- Detail** (sub-tabs): Descriptions, Revisions, Alternates, UOMs, Lots, Sites.
- Detail List** (sub-sub-tabs): List, Planning, Warehouses, Sales Kits, Cycle Count.

Key fields and sections visible include:

- Site:** Main (dropdown)
- Primary Warehouse:** Main (dropdown)
- Costing Method:** Std (dropdown)
- Costing Lot Size:** 0.00
- UOM:** BR
- Incoming Inspection:** (checkbox), with a dropdown menu showing 'Mandatory' and 'Optional'.
- Link to Contract:** (checkbox)
- Non-Stock Item:** (checkbox)
- Quantity Bearing:** (checkbox)
- Phantom BOM:** (checkbox)
- Mult Level CTP:** (checkbox)
- Type Detail:** Type: Sales Kit (dropdown), Site: (dropdown), Transfer Lead Time: 0
- Inventory:** Min On-Hand: 0.00, Max On-Hand: 0.00, Safety Stock: 0.00, Re-Order to Max: (checkbox), SN Format: (button)
- Manufacturing:** Backflush: (checkbox), Limit Production Yield Recalc: (checkbox), Raw Material: (checkbox), Machine MES: (checkbox)
- Purchasing:** Buyer: (dropdown), Generate PO Suggestions: (checkbox), Buy To Order: (checkbox), Drop Ship Item: (checkbox), Min Order Qty: 0.00, Lead Time: 0, Forecast Time: 0, Supplier: (button)
- Urgent Planning:** Min Order Qty: 0.00, Mul Order Qty: 0.00, Lead Time: 0, Supplier: (button)
- Calculate Min/Max/Safety Values:** History Window: 0, Safety Factor: 0, Max Factor: 0, Exclude Calculation: (checkbox), Include Sales History: (checkbox), Include Job Materials: (checkbox)

Transactions Updated

- To ensure the Crawford Software extension supports all business process the following transactions are updated to use the new functionality:
- Part, Job Entry, Purchase Order Entry

Thank You