



Epicor iScala Feature Summary
iScala 2023.1

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Application Modules and Features

General

Automated ATP Rescheduling

New unattended job for ATP rescheduling.

Affected Modules: OR.

Epicor Service Connect is affected: Managers: Job Request In.

Standard Cost Calculation

Calculate and update the standard cost during non-office hours by a scheduled job.

Affected Modules: MP.

Epicor Service Connect is affected: Managers: Job Request In

Include extended user defined fields in emails used to send generic invoices

The placeholders <U01> - <U30> can be used to insert the information from the corresponding extended user defined fields to the email subject and body.

Affected Modules: SL.

Epicor Service Connect is not affected.

Check stock item file for selected stock items

The special data function check stock item file is extended with a stock item range selection.

Affected Modules: SY.

Epicor Service Connect is not affected.

Company properties in SSRS reports

A new dataset CompanyProperties exposes company properties missing in the CompanySettings dataset. The new dataset is linked to a new permission CompanyProperties (Data Sets tab).

Affected Modules: SSRS Reporting.

Epicor Service Connect is not affected.

Financial Modules

Internal Invoice and VAT for Sales Order Line

When the Use Tax code from order line for internal customers (533) feature activation key is enabled, the invoice customer has Tax Liability set to Yes and the order head VAT code is not set to override the line tax, the sales invoices will use the tax code from the sales order line.

Affected Modules: OR, SY.

Epicor Service Connect is affected. Managers: Sales Order Out.

Copy account mappings for consolidation from selected year

A new function is available for copying account mappings in General Ledger module. It supports copying mappings defined from the company the user is logged on to. A user shall be able to copy mappings for the target companies s/he has access.

Menu path: *General Ledger → Optional Modules → Consolidation → Copy Chart of Account Conversions*

Affected Modules: GL.

Epicor Service Connect is not affected.

Controlling row/column visibility in the Configurable Financial Reports (CFR)

Starting in iScala 2023.1, the system allows controlling visibility of selected rows and columns.

Affected Modules: GL

Epicor Service Connect is not affected.

Controlling aggregation of amounts from child rows in CFR

Starting in iScala 2023.1, the system allows controlling how the amounts from the child rows are aggregated on the parental rows. One may set to add an amount from a child row on the parent, to exclude the amount and to not calculate an amount at all. In the latter case a text line is created in the report. A row description may be empty thus adding an extra space in the report.

Affected Modules: GL

Epicor Service Connect is not affected.

Splitting parental rows by accounts/accounting dimensions in CFR

Starting in iScala 2023.1, the system allows splitting parental rows by accounts/accounting dimensions. Choosing one of the split operators one tells the system to create in the report as many report sections as there are accounts or accounting dimensions satisfying the condition specified for the split operator.

The descriptions for newly created rows can be specified by a template of a form:

Any_Text_1<Code>Any_Text_2<Name>Any_Text_3

In the report the system substitutes <Code> by the code of the account/accounting dimension, <Name> - by the

description of the account/accounting dimension in the language of the report.

Affected Modules: GL

Epicor Service Connect is not affected.

Fixed reporting periods in CFR

Starting in iScala 2023.1, the system allows printout of financial information for fixed Book-Entry Periods as opposed

to existing functionality of choosing the Book-Entry Period at the printout. This affects the following Time Spans: Reporting Period, Year Excluding Reporting Period, Year Including Reporting Period. The Book-Entry Period is identified by a number from 1 to 24.

Affected Modules: GL

Epicor Service Connect is not affected.

Configurable Financial Report Library

Starting in iScala 2023.1, the system supports Configurable Financial Report Library – an installation wide repository

of financial reports that may be printed from any company in the iScala installation. The reports in the library may be

organized in an arbitrary hierarchical structure according to a chosen report classification. If an iScala company is subscribed for a report from the library, the report may be printed from the company. Working with the library is protected by a permission. Users with sufficient permissions may publish company dependent reports in the library

and copy the library reports to the local repository.

Affected Modules: GL

Epicor Service Connect is not affected.

Visibility of rows with zero amounts in CFR

Starting in iScala 2023.1, the system allows creating a report parameter controlling visibility of rows with zero amounts. If the parameter is created on a report and set to Yes at the report printout, then the terminal rows with zero amounts are excluded from the printout. The parental rows containing only zero amount rows are also excluded

from the printout.

Affected Modules: GL

Epicor Service Connect is not affected.

Collapsible rows in CFR

Starting in iScala 2023.1, the rows in the automatically generated SSRS reports may be made collapsible according to

the row set hierarchy.

Affected Modules: GL

Epicor Service Connect is not affected.

Logistics and Stock Modules

Generate picking requests by date selection

The new run-time parameter "Picking requests up to selected date" supports generation of picking requests for order lines planned for delivery up to (including) the selected date.

*Affected Modules: OR.
Epicor Service Connect is not affected.*

Warehouse In Bin Support

The Warehouse In manager has been extended with an option to create, update and delete Warehouse Bins. Each of these actions are validated the same way as in the back-office function Stock Control → Bin Management → Enter/Adjust Bins, using different rules depending on if Enhanced Bin functionality is licensed or not.

*Affected Modules: SC.
Epicor Service Connect is affected: Managers: Warehouse In.*

Multiple validity periods for customer and supplier prices

The customer- and supplier specific prices have been extended and allow definition of price and discount for four, non-overlapping, validity periods (date intervals). The default price and discount are retrieved from the period that includes the pricing date. In case none of the periods include the pricing date, the next source for the price and discount is considered.

*Affected Modules: SC, OR, SM, CM, PC.
Epicor Service Connect is affected: Managers: Supplier/Customer Price List In.*

Enable ATP cut-off date from order line

The ATP functionality has been extended. In case of expected shortage, ATP proposes to deliver the quantity considered as available. For more information, see Accepted Delivery Date. A new feature activation key, Requested date as default ATP cut-off date, has been added to the sales order group.

Presentation of pricing in Sales order phase II

The price query at sales order line entry has been enhanced with new layout and allow selection of a price from the query to apply to the order line.

*Affected Modules: OR
Epicor Service Connect is not affected.*

Link Sales Order Line to Contract

In cases where contract management is licenced, the functionality enables the possibility of linking the sales order line to a sales contract. It brings the contract link to the order line level.

*Affected Modules: SC, OR, SY.
Epicor Service Connect is affected. Managers: Sales Order In, Sales Order Out.*

Material Production Control

Permissions for adjusting work order BOM and operations

Allow change of WO BOM and Allow change of WO OP permissions have been added to allow changing of work order material lines and operation lines.

The permissions grant required access in back-office functions Enter/Adjust Work Order, Material Issue by WO, Operation Report, and the Work Order (Operations) Update managers.

*Affected Modules: MP.
Epicor Service Connect is affected: Managers: Work Order Update, Work Order Operations Update*

Advanced Payroll

Report Preview

Starting in iScala 2023.1, the Report Preview functionality for Advanced Payroll displays on a separate tab when used in iScala client. Additionally, this eliminates the dependency on the use of Internet Explorer.

*Affected Modules: WPA.
Epicor Service Connect is not affected.*

Technical Features

General

Improvements in Snap Search Builder and Snap Search runtime

- It is now possible to copy results of snap searches executed in Snap Search Builder, using the Copy button available in Snap Search Results window, just like when snap search is executed in iScala client. Availability of the command is subject to General\System Utilities\Copy Tabular Data to Clipboard permission, as in iScala Client.
- In iScala Client, Snap Search Parameters dialog shown by clicking Re-enter parameters, shows last used parameter values for the current snap search execution; Reset button can be used to revert the values to initial parameter values for that snap search execution.
- In Snap Search Builder, Snap Search Parameters dialog uses parameter values that were last used during previous execution of that snap search within the current editing session, if they did not match the default values of those parameters. Re-enter parameters brings up Snap Search Parameters dialog with last used parameter values as well; Reset button can be used to revert parameters to their default values.

Affected Modules: N/A

Entry Type Bindings to Roles

In addition to allowing binding entry types to users in current company, iScala now supports binding entry types to

roles. In that case, the entry type is considered bound to the user, if that user has the corresponding role in the current company and year. Please refer to Assigning Entry Types to Roles and Users for additional information.

Also, permission checking for actions related to entry type management is extended. Please refer to Security Settings

for Entry Types for additional information.

New permission to control access within Reconciliation Tool

New permission to control access to companies and years in Reconciliation Tool is added: *General - General Ledger- Reconciliation Tool*.

Epicor Service Connect

Improvements in Task Monitor and Tasks Snap-in

- Security changes to ensure that list of companies is restricted to the those the user has right to access within Task Monitor.
- Enhanced filter options now include a drop-down list for Company code to display all the companies that a user has access to.
- Improvements to the Tasks in Administration Console, In company instances of Tasks snapin are available if the user has View Active Tasks or View Completed tasks in that company.
- Access to the Installation level for Task Monitor is required to access task associated with an invalid company or no company. Additionally, this access is required for availability of the Attributes node.

Support of https protocol for Task Monitor and Schemas

It is now possible to specify in Installation Properties – Other Properties that access to Task Monitor and

schemas should be performed using https protocol instead of http.

This setting is applied when starting Task Monitor within iScala Client, when using the updated Task Monitor shortcut, as well as by Task Monitor itself, and other programs.

Visibility of Sub-Workflow response and of Dynamic Properties

Availability of Sub-Workflow response and of Dynamic Properties of Poster, Requester and Task during design-time and runtime is extended, so that they are visible through workflow elements considered transparent for them - Splitter, Choice, Condition, Conversion.

Improvements in Copy-Paste and Undo/Redo functionality in Workflow Designer

Pasting copied elements in Workflow designer is improved, to make them behave consistently after paste. Implementation of Undo/Redo in Workflow Designer is improved. Undo and Redo toolbar buttons are now able to show history of preceding/subsequent steps.

Support of shared mailboxes in Office 365/Exchange Online for POP3 and IMAP channels

Service Connect POP3 and IMAP input channels now support retrieving messages from shared mailboxes of Office 365 and Exchange Online. Additional setup is necessary in Office 365/Exchange Online to allow access - please refer to the setup steps.

Support of Kinetic

iScala 2023.1 is updated and tested to be compatible with Kinetic 2023.1 (11.2.300) and Kinetic 2023.2 (11.2.400). Since Kinetic 11.2.100 and later do not provide WCF service endpoints in the delivery, import of WCF references from those versions of Kinetic is not supported in Service Connect. The last supported version is Kinetic 11.1.200 WCF Service. Epicor/Kinetic .NET and REST references are supported up to Kinetic 11.2.400; import of Generic WCF service references is supported the same way as in previous versions of Service Connect.

Compatibility

MS SQL 2022 Compatibility

The system is now tested for compatibility with Microsoft SQL Server 2022.

Affected modules: N/A.

Windows 10 Version 22H2 Compatibility

The system now supports Windows 10 version 22H2.

Affected modules: N/A.

Windows 11 Version 22H2 Compatibility

The system now supports Windows 11 version 22H2.

Affected modules: N/A.

Reporting

Crystal Reports SP34 Runtime Compatibility

The system now uses SAP Crystal Reports runtime engine for .NET Framework, with Service Pack 34 (v.13.0.34.4636).

Affected modules: N/A.

Enhancements in Reporting Engine

- Sending reports by mail using local mail client when using Standard (Crystal Reports) output channels now supports Outlook from Office 365 click-to-run installations.
- SSRS report output channels now support sending reports by mail using local mail client.
- It is now possible to add additional attachments to be sent by mail along with the report when using Standard (Crystal Reports) or SSRS report output channels.
- Users can now disable mail address resolution when working in Send By Mail or Settings – Mail dialog of iScala Report Preview.
- Administrators can now disable mail address resolution in iScala Administration Console when working with report output channel properties.
- It is now possible to store mail message texts larger than 255 characters in report output channel settings from Administration Console.

Affected modules: N/A.