



Basic Form Reflector

ROI Consul

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Basic Search Form Reflector

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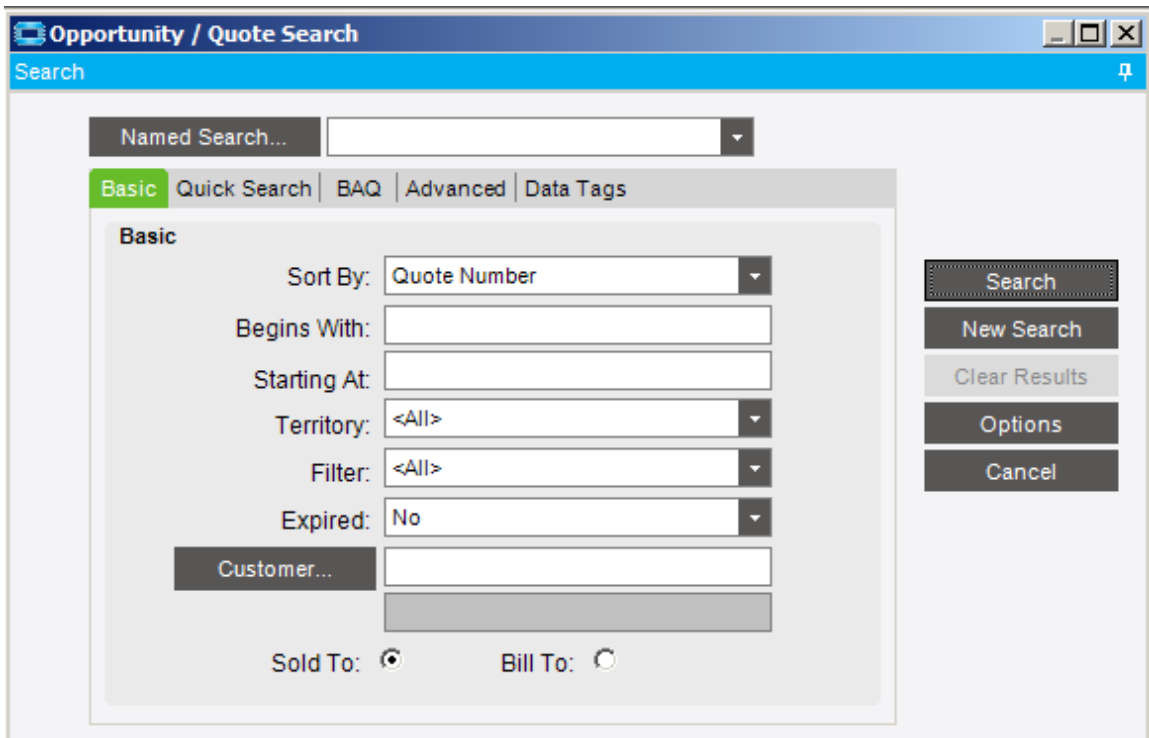
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## Introduction

Epicor standard search is a full featured, dynamic and flexible tool to allow you to search for the correct data and return it to the owner form. However, it is our perspective that it is sometimes too full featured and takes multiple clicks to get the data and search parameters required, especially if you have to use BAQ or Advanced Searches.

ROI Consul have developed the Basic Search Form Reflector to cut straight to the chase of your searching needs. It allows you to enter a multi-table where clause on each field in the business object adapters dataset. It will then return results to the interface based on those values.

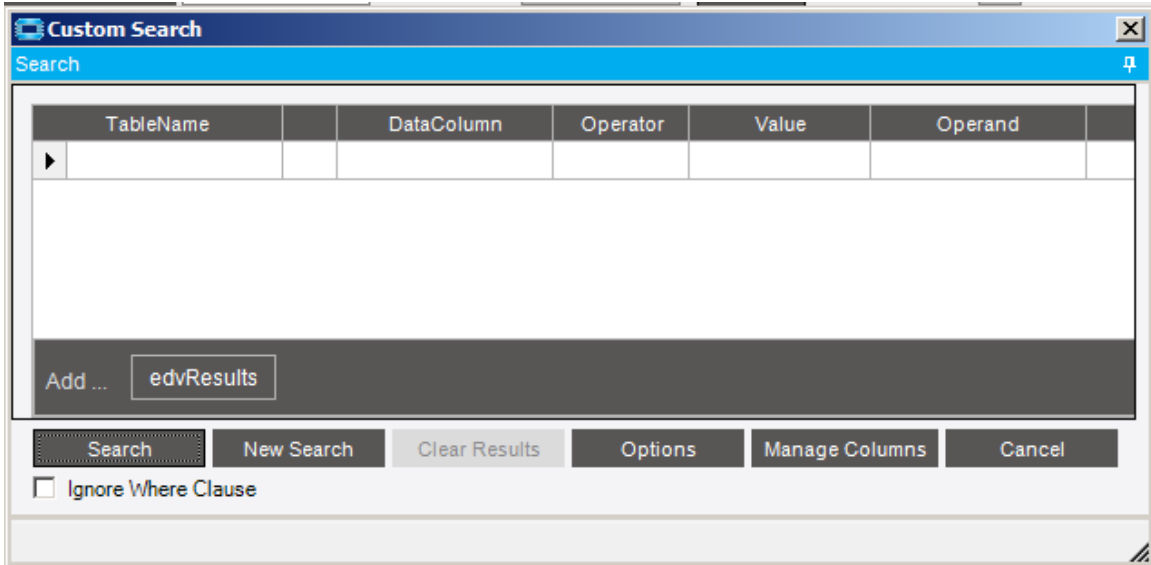
It has standard features such as Search, New Search, Clear Results, Search Options as well as a new feature that also allows you to configure the columns returned to the search dialog.



The screenshot shows a software window titled "Opportunity / Quote Search" with a "Search" tab. At the top, there is a "Named Search..." dropdown menu. Below this are four tabs: "Basic" (selected), "Quick Search", "BAQ", and "Data Tags". The "Basic" tab contains several search criteria fields: "Sort By" (set to "Quote Number"), "Begins With", "Starting At", "Territory" (set to "<All>"), "Filter" (set to "<All>"), "Expired" (set to "No"), and "Customer...". At the bottom of the "Basic" tab, there are radio buttons for "Sold To" (selected) and "Bill To". To the right of the search criteria is a vertical stack of buttons: "Search", "New Search", "Clear Results", "Options", and "Cancel".

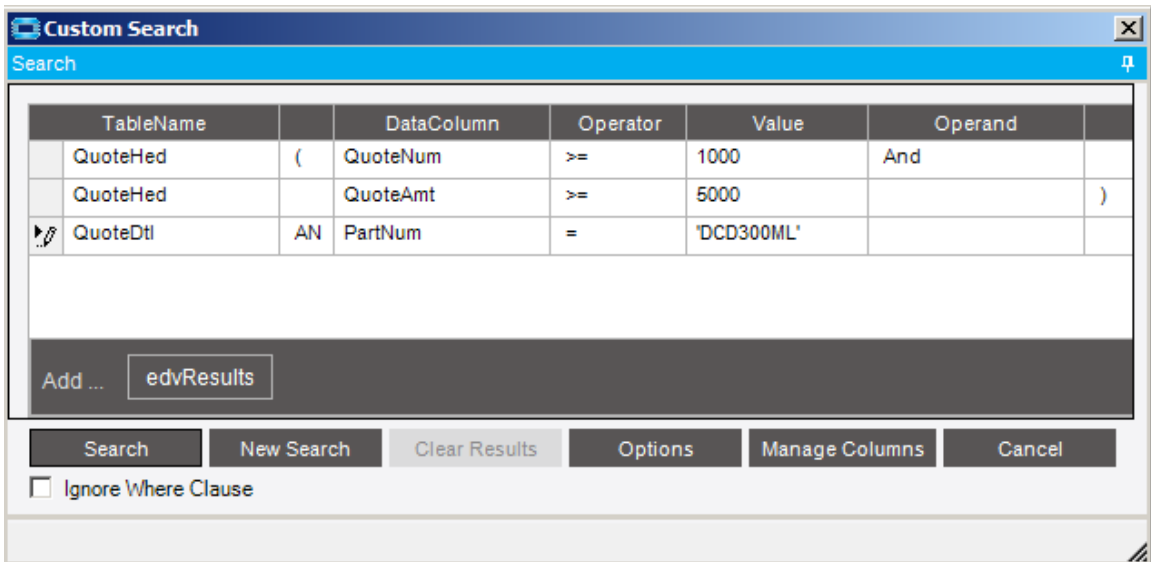
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### Functionality



The screenshot shows a dialog box titled "Custom Search" with a search icon in the top right corner. Below the title bar is a "Search" label. The main area contains a table with the following columns: TableName, DataColumn, Operator, Value, and Operand. The table is currently empty. Below the table is a dark grey bar with an "Add ..." button and a text input field containing "edvResults". At the bottom of the dialog, there is a row of buttons: "Search", "New Search", "Clear Results", "Options", "Manage Columns", and "Cancel". Below these buttons is a checkbox labeled "Ignore Where Clause" which is currently unchecked.

Search, New Search, Clear Results, Search Options, Cancel and More (Next) Button Functionality, exactly the same as standard Epicor Search.



The screenshot shows the same "Custom Search" dialog box, but now the table is populated with search criteria. The table has the following data:

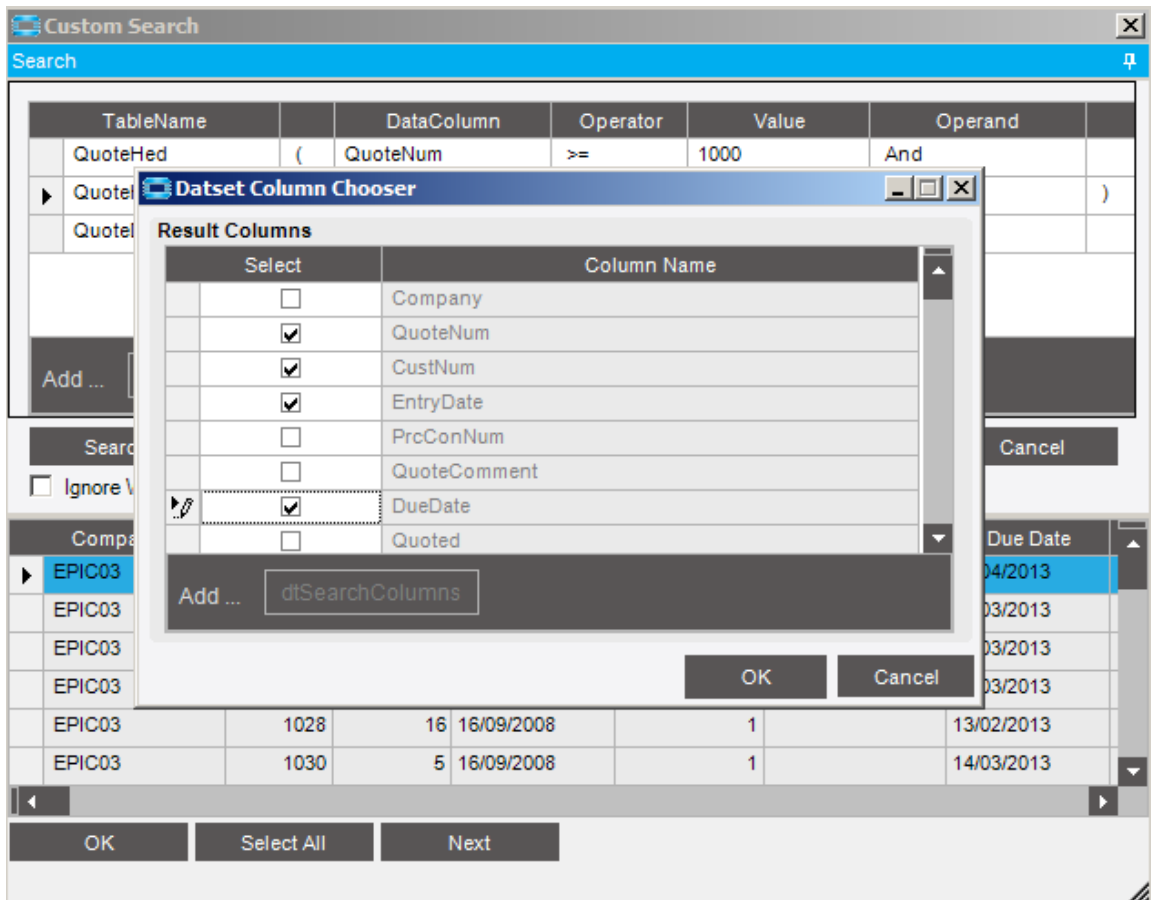
TableName		DataColumn	Operator	Value	Operand
QuoteHed	(	QuoteNum	>=	1000	And
QuoteHed		QuoteAmt	>=	5000	)
QuoteDtl	AN	PartNum	=	'DCD300ML'	

Below the table is a dark grey bar with an "Add ..." button and a text input field containing "edvResults". At the bottom of the dialog, there is a row of buttons: "Search", "New Search", "Clear Results", "Options", "Manage Columns", and "Cancel". Below these buttons is a checkbox labeled "Ignore Where Clause" which is currently unchecked.

Full featured, multi-table where clause capability. Also can ignore where clause.

4 visit [www.roiconsul.co.uk](http://www.roiconsul.co.uk). Call 0330 043 1812 or email [info@roiconsul.co.uk](mailto:info@roiconsul.co.uk) for more information.

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Configure the columns returned to the grid.

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**Custom Search** [X]

Search [?]

TableName		DataColumn	Operator	Value	Operand
QuoteHed	(	QuoteNum	>=	1000	And
▶ QuoteHed		DueDate	>=	'04/01/2011'	)
QuoteDtl		PartNum	=	'DCD-300ML'	

Add ...

Ignore Where Clause

Quote	Customer	Entry Date	Due Date
▶ 1000	9	18/06/2010	19/04/2013
1021	7	15/09/2008	14/03/2013
1022	2	15/09/2008	15/03/2013
1026	19	16/09/2008	19/03/2013
1028	16	16/09/2008	13/02/2013
1030	5	16/09/2008	14/03/2013
1032	21	16/09/2008	17/07/2012

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## Product Roadmap

Future releases of the product, planned for 2016 include, but are not limited to:

- DataTable based dynamic drop down
- Full datatype verification to ensure 100% query success.
- Mass Import into Forms

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## About ROI Consul

**Mission Statement: To provide our customers with robust IT consultancy that gives a measurable return on their investment in us.**

ROI Consul focus is as a System Architect, Business Analysis & Design, Software Delivery, Reporting and Integration Consultancy. We pride ourselves on proven skills in these areas.

Microsoft Certified experts with accreditation's in Business Analysis, Project Management and an in-depth experience. We can deconstruct your ERP, CRM, Web Solutions, Supply Chain or other internal systems to provide impartial advice on the best approach to integrations, customisations, operational and management reporting solutions, for your business.

We are also specialist in Vantage, Epicor 9 and Epicor 10 Technology, Including Epicor SDK.

ROI Consul can also provide you with reporting outside of the standard set provided by your system in a technology that suits you. Should your system operate using Crystal Reports or SQL Server Reporting Services, we can provide you with a consultation and then display your KPI's in a format that you understand.

With an in-depth understanding of the SDLC (Software Development Lifecycle) and a proven ability to speak to customers in their own language, globally. ROI Consul only work on solutions that we can prove and that are deliverable. All projects are fully managed, documented and tested using our own internal standards, although we will gladly work within your organizations quality and documentation parameters as required.

ROI Consul is a company that prides itself on being able to translate each business process into a technical implementation that is transparent and efficient for it's stakeholders. Our role is to understand how the business user interacts with the system, surrounding technology, the system itself and provide a solution that allows the user to do their job in the most efficient, effective and robust manner. This ultimately streamlines the organization, improves employee efficiency and makes life easy for all concerned!

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## Basic Search Form Reflector

We can integrate your systems into a synergy in which you can reduce cost and time per click, report on daily company activity effectively, as well as provide reporting for historical analysis, KPI Monitoring and improvement strategy.

If your organization uses Epicor EPM, including Performance Canvas, or are planning to do so, we can offer you expert level assistance. This includes EPM Server, Performance Canvas and associated Content packs. All EPM areas are a specialist topic for ROI Consul, having unrivalled and demonstrable project experience of this vertical. We can also offer Epicor SDK Training.

ROI Consul specialize in the following areas:

- Epicor ERP Consultancy
  - SDK and Black-Belt Customisation
  - Epicor Service Level Agreements and Service Contracts
- Business Process Review, 'As-Is' and 'To-Be' Solicitation and Documentation
- Business Analysis
- Software Architecture
- Functional and Technical Design
- Project Management
- Documentation at all levels
- System Integration
- Online and Classroom Training

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