

# iScala 2.3 SR3 Top 14 Reasons to Upgrade

## About Epicor

Epicor is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality, and services industries. Founded in 1984, Epicor serves 20,000 customers in more than 150 countries, providing solutions in over 30 languages.

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iScala 2.3 SR3 is the latest release for the iScala product family. Focusing on the key themes necessary to allow organizations to compete in today's turbulent economic environment, iScala 2.3 SR3 provides powerful functionality and control features that allow you to manage your business efficiently and to gain market share. This release focuses on the areas of controllability, scalability, usability and mobility; all areas that companies are looking for to make them better able to provide strong customer service, reduce costs and grow their businesses.

## Controllability

Business control is crucial for any business whether it is a smaller growing organization or a large multinational with distributed resources. iScala 2.3 SR3 is designed to allow companies to implement a number of control capabilities across several key areas including relationships with customers, suppliers, and employees.

### 1. Business Transaction Control Engine

iScala 2.3 SR3 sees the introduction of a new feature set called the Business Transaction Control Engine (BTCE). This allows customers to control specific business transactions or business events. This feature set provides support for the following functions in the Sales, Purchase and Service Management modules:

- License Control (LC)
- Policy Management
- Dangerous Goods (DG) Management

### 2. Advanced Credit Control

iScala 2.3 SR3 introduces several enhancements to the credit control capabilities in iScala. These enhancements allows organizations to define a credit authorization/approval matrix consisting of up to 10 user-defined credit limit overrides. Each credit limit override is matched to a specific user permission. These overrides allow the release appropriate user to credit blocked order lines for delivery using the delivery planning action screen (introduced in iScala 2.3 SR2).

### 3. Revenue Recognition

The Revenue Recognition module included in iScala 2.3 SR3 is designed to determine the conditions (how and when) under which revenue and expenses are recognized. The revenue recognition module supports both the Contract and Project Management applications. Three different revenue recognition models are supported, in iScala 2.3 SR3, depending on the source of the calculations:

- Contracts - Straight-line
- Projects - Percentage (%) of completion
- Projects - Multiple deliverables

This feature can be used to do the following:

- Configure revenue recognition models
- Create, update, delete, roll back, or print out revenue recognition proposals
- Print the day book journal and update the general ledger with revenue recognition accounting transactions

#### **4. Event Based Invoicing in Contract Management**

iScala 2.3 SR3 adds support for event-based invoicing. It is possible to specify an Invoicing Plan for each contract (one plan per contract). The Invoice printing routine selects contracts for invoicing basing on events in the Invoicing Plan. Invoice plans can be configured to trigger invoicing on specific dates.

#### **5. Supplier Engagement Rules**

iScala 2.3 SR3 adds the ability for organizations to control how they interact with suppliers and what activities are allowed. This can be controlled at both corporate and local level, allowing organizations to implement centralized procurement relationships or eliminating untrustworthy suppliers.

#### **Scalability**

Scalability can be defined as the process of being able to do more with the same amount of resources. iScala 2.3 SR3 adds a number of features allowing iScala to scale up to support more transactions as well as process the same transactions more effectively utilizing less resources.

#### **6. Expanded Transaction Capacity**

iScala 2.3 SR3 allowed the length of the ledger transaction number counters to be extended from six to nine digits for customers using the iScala Enterprise Server. This is supported in all interfaces and modules of iScala. iScala 2.3 SR3 extends this even further extending all invoice number counters such as invoice/credit note counters, PL reference counters, and journal counters to nine digits (Enterprise Server is required).

#### **Performance Enhancements in Service Connect**

iScala 2.3 SR3 has been enhanced to provide much stronger capabilities when using Epicor Service Connect including allowing user searches to find workflow elements.

#### **7. Performance Enhancements in Sales Order Entry**

Sales Order Entry, both manual and via Service Connect, has been enhanced for greater speed and efficiency to allow you to process more transactions, more efficiently, thus increasing your sales and decreasing your cost of transaction.

#### **8. Automatic Bank Operations and Reconciliations**

iScala 2.3 SR3 provides the possibility to import bank statements in a predefined format and reconcile them with transactions in the Sales Ledger, Purchase Ledger and General Ledger.

#### **9. Data Management Enhancements**

iScala 2.3 SR3 includes a number of data management enhancements. The optimization of several queries and data management routines allows organizations to work with larger data volumes more efficiently.

#### **Usability**

The Usability enhancements added in iScala 2.3 SR3 are designed to allow organizations to work more efficiently while simultaneously adding support for new business processes that aid the organization and help drive growth.

## 10. Sales Order Grid Entry

iScala 2.3 SR3 sees the introduction of a user-definable, grid-based, spreadsheet style data entry form. Users can now define different permission controlled templates for the entry of Sales Order lines. These templates offer several features including the following:

- User specific grid layouts and grid column widths
- Data filtering and sorting - date values are supported properly on data entry, sorting, filtering, and copying.
- Order type templates
- Revenue recognition models

## 11. Box Handling/Containerization In Common Picking

iScala 2.3 SR3 introduces support for the management of Dangerous Goods (DG) in iScala. As part of the support for this, Common Picking is enhanced to support picking to/packing to boxes, pallets or containers. iScala 2.3 SR3 allows users to create, edit, or delete boxes. One or more picking lists can be included in a box/container/package, alternatively, one picking list can be split across multiple boxes. Transport and other delivery documentation is printed per box. Box Handling in Common Picking is only available when iScala Supply Chain Tools is licensed.

## 12. Snap Search Improvements

A number of improvements have been made to Snap Searches including:

### Independent Default Snap Searches

The iScala Administration Console and iScala 2.3 SR3 Client are enhanced to make it possible to link a Snap Search to a specific field, not to the whole field family. When creating a Snap Search link, the user can choose to link the Snap Search as one of the following:

- Global - links applied to all fields with the same QuerySetID
- Local - links applied to the current field

The Snap Search visibility can be defined as either private or public:

- Public - links applied to all users
- Private - links applied to the current user only

### Import/Export of Snap Search Link Parameter Mappings and Validation Roles

iScala 2.3 SR3 extends the management of Snap Searches allowing the iScala 2.3 SR3 client and the iScala Administration Console to process parameter mappings and validation roles of Snap Search links during import and export.

The structure of a Snap Search definition file is extended to store parameter mappings and validation roles. The Snap Search links import and export procedures allow the user to select whether to import/export additional information. The import procedure is enhanced to provide the user with a way to map exported and existing roles.

### Printing from Snap Search

iScala allows customers to easily create custom queries or grid-based reports using iScala Snap Searches. iScala Snap Searches allow users to copy data shown in the Snap Search results window. iScala 2.3 SR3 extends the capabilities of these queries allowing users to print the results from the query window to paper or file using Microsoft® SQL Server® Reporting Services (SSRS).

## **Mobility**

Mobility is not just allowing users to access iScala from the latest mobile devices. This is about allowing your organization to mobilize iScala where your business needs this most; whether this is allowing Service engineers the ability to work remotely increasing efficiency, or allowing organizations to deploy iScala where they are currently doing or planning on doing business.

### **13. Integration to Epicor Mobile**

Epicor Mobile Field Service is an enterprise mobility solution for field service providers incorporating comprehensive field service functionality and full data synchronization in an easy-to-use, workflow-based, mobile application for wireless PDAs. Epicor Mobile Field Service integration to iScala is bi-directional and is based on Epicor Service Connect.

### **14. Global Enhancements**

iScala 2.3 SR3 continues to deliver on Epicor Software's commitment to deliver iScala where our customers want to do business. As part of this, iScala 2.3 SR3 sees a number of enhancements to the global business capabilities within iScala.

#### **Completion of support for SAF-T**

Support for the Standard Audit File – Tax (SAF-T) was split into two phases. The first phase of development was completed in iScala 2.3 SR2. The second phase has been included in the iScala 2.3 SR3 release. This constitutes the implementation of invoice line history for all modules including Direct Invoicing; Service, Contract and Project Management; and Purchase Control.

#### **Extended SAF-T Reporting Capabilities**

SAF-T reports can be very extensive and require a considerable amount of time to review and analyze. The summary SAF-T report is a more flexible report that presents the information contained in SAF-T in a compress way summarizing the key data.

## **Advanced Cash Discount and Payment Terms**

iScala 2.3 SR3 includes support for deduction of cash discount at the point of invoicing. This was a Spanish feature available in previous versions that has been merged into the new release.

## **Italian VAT - Invoice Date Validation**

To support consistent reporting of VAT, Italian VAT regulations prohibit entry of new purchase invoices with a book-entry or posting date prior to what was used for the last invoice received. iScala 2.3 SR3 adds support for this regulation. In Italy, tax descriptions must be printed on invoices even if the tax rate is zero. Users can now decide whether they want to print tax description with the zero rate or not.

## **IBAN Support in iScala Payroll**

In Finland, IBAN numbers are required for payroll transactions. iScala Payroll in iScala 2.3 SR3 has been extended to support IBAN numbers.

## **International Bank Reference Number in Finland**

In Finland, a new international bank reference number is required. This number is used for reconciliation of invoices and payments in sales and purchase cycles. iScala 2.3 SR3 adds support for this reference number.

## **Withholding Tax Report**

Users can print in the Purchase Ledger Detailed Balance Report the withholding tax amounts of outstanding invoices. This helps reconciling General Ledger and Purchase Ledger balances.

## **New Reverse Charge Mechanism for European (EU) Services VAT**

iScala 2.3 SR3 extends support for the reverse VAT charge applicable to all the European Community (EC) countries: VAT is due in the country where the customer is established.

## EU VAT Rules in Sweden

The EU tax rules in Sweden are slightly different from rules used in other countries in the way tax is booked in the sales ledger. When a company sells to another company (B2B), the tax should be reversed to the customer. iScala 2.3 SR3 adds support for this regulation.

## Payment Terms Enhancement

iScala 2.3 SR3 allows customers to configure extended payment terms for customers allowing customers to better meet the demands of changes within their relationships with their customers as a result of changes in the economic climate.

## EC Sales List and EC Purchase List Report Formats

It is possible to print the "EC Sales List" (or recapitulative statement) as both paper reports and reports in XML format. When printing the "EC Purchase List" users can specify how the tax code information is printed: as total amount or separately for each line.

## UBL and Swedish Svofaktura (electronic invoices)

iScala 2.3 SR3 sees several updates to the support for Swedish Svofaktura after the introduction of this feature in iScala 2.3 SR2 offering a more robust integration building on the latest Svofaktura formats

## Extended Cheque Numbers

Banks in Egypt have increased the length of their cheque numbers. Users can now define the length of cheque numbers to be between 6 and 15 digits.

## Use Invoicing Fee as Stamp Duty

Support for Stamp Duty was added to iScala following changes to law in Tunisia. The stamp duty is a fixed value charged on an invoice that must be excluded from discount and tax calculations.

## Enhanced Unicode Support

iScala 2.3 SR3 allows for the configuration of the length of a data field when using hieroglyphic characters (i.e., Chinese characters) in iScala.



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