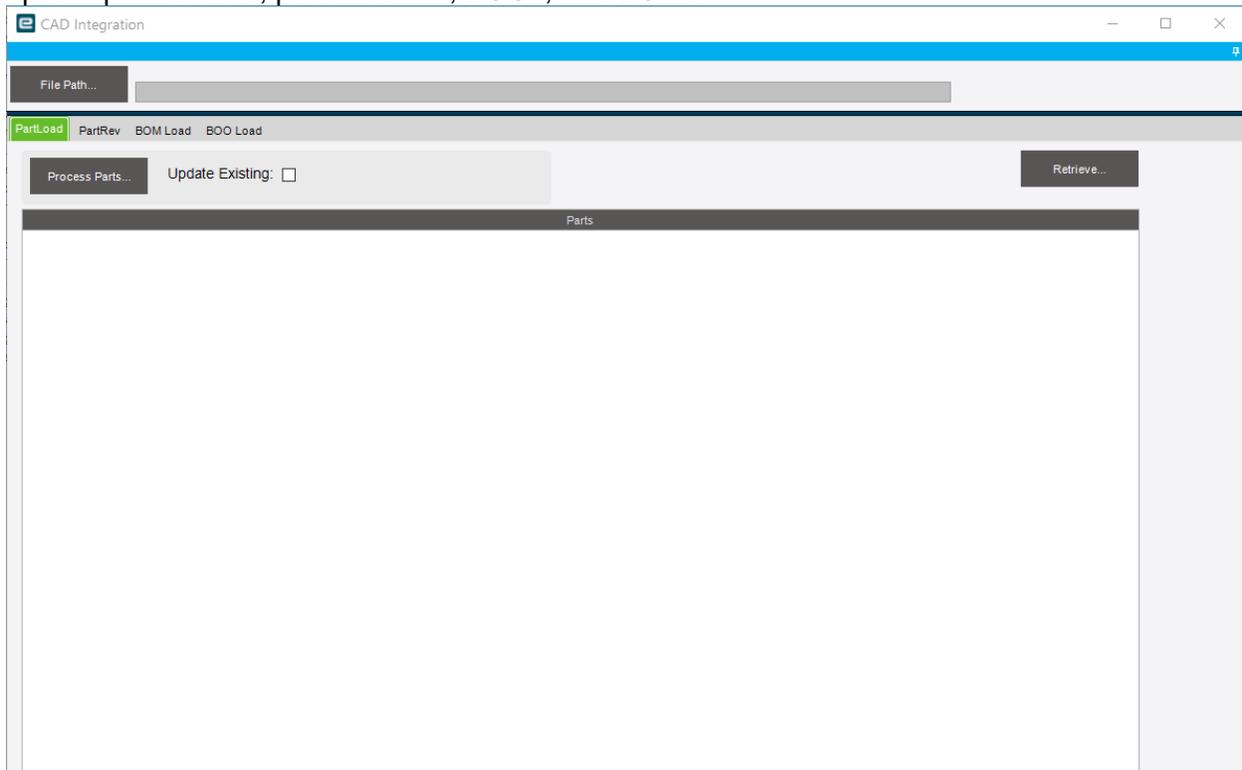


# PtekCAD

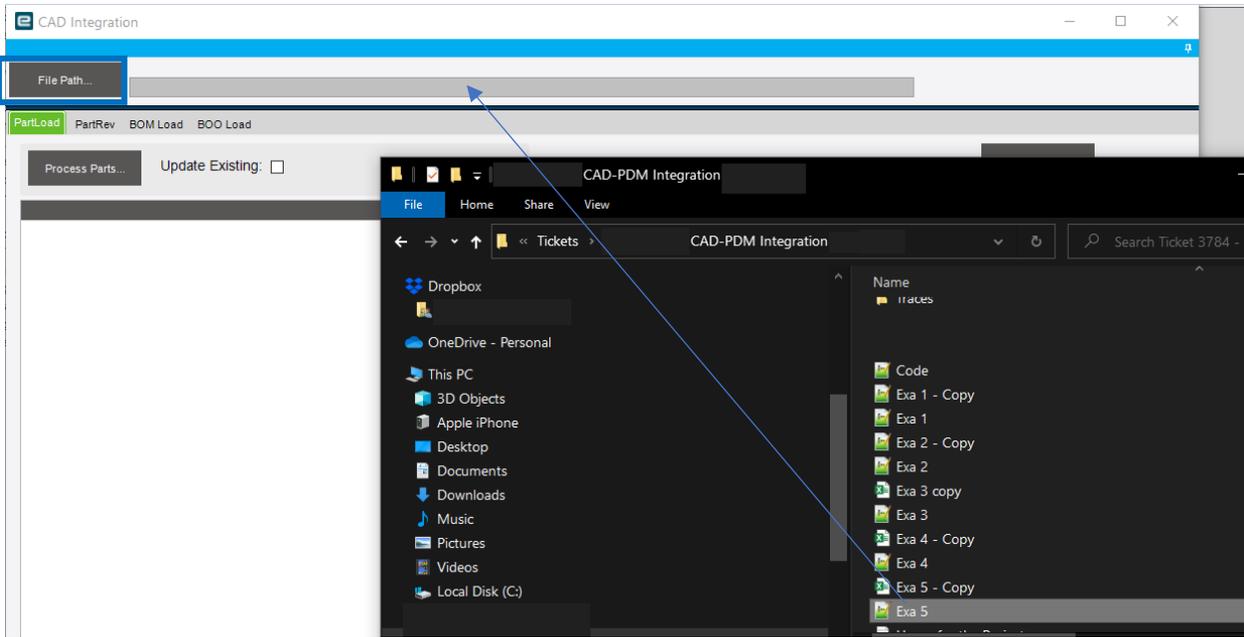
A Practical Solution for Engineering in Epicor®

PtekCAD is an embedded Epicor® application that allows you and your company to quickly load AutoCAD BOMs and BOOs into Epicor®. Our customers are saving time and money by utilizing this simple and straightforward application. No more lost hours in Engineering Workbench matching up your BOOs and BOMs to Epicor®.

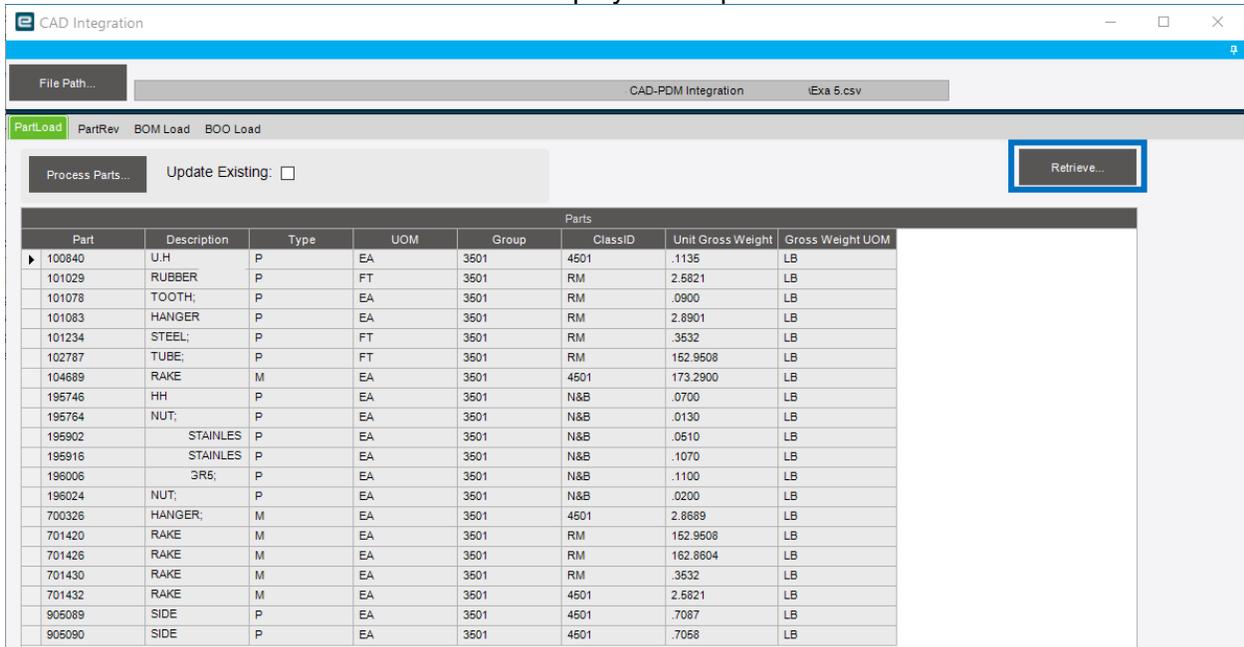
First, simply export your AutoCAD tables to a flat file (CSV). Next, point PtekCAD to that flat file. From there, PtekCAD will use the flat file to create your records in Epicor. It will build or update part records, part revisions, BOOs, and BOMs.



First, you'll see our File Path button at the top of the application. This will allow a user from any computer, on any network, to simply point to the flat file created from AutoCAD. This also gives you flexibility if you're working remotely. Just click on the File Path button, locate your flat file, and drag-drop it in the File Path textbox:



The user can click the Retrieve button to display all the part records that match the CSV file:



Our customers liked this because it allows them to see what the PtekCAD application is creating in Epicor® in real-time. You'll see similar retrieve buttons in each tab (Part Load, PartRev, BOM Load, BOO Load). They all allow the user to see what's being created or updated.

Each column you see above can be updated by the CSV file coming from AutoCAD. If the record does not exist (meaning you're adding a new part that's coming from the CSV file), the part will be added.

Process Parts clicking the Process Parts button, the PtekCAD application will scan the part records in the flat file and add or update accordingly. You'll notice the "Update Existing"



checkbox. Our customers wanted to control whether the application would update existing part records or not, so this checkbox was added. If it's checked, and the process parts button is clicked, PtekCAD will check to see if the value in the column has been changed and update Epicor® accordingly.

| Part   | Description | Type | UOM | Group | ClassID | Unit Gross Weight | Gross Weight UOM |
|--------|-------------|------|-----|-------|---------|-------------------|------------------|
| 100840 | U.H         | P    | EA  | 3501  | 4501    | .1135             | LB               |
| 101029 | RUBBER      | P    | FT  | 3501  | RM      | 2.5821            | LB               |
| 101078 | TOOTH;      | P    | EA  | 3501  | RM      | .0900             | LB               |
| 101083 | HANGER      | P    | EA  | 3501  | RM      | 2.8901            | LB               |
| 101234 | STEEL;      | P    | FT  | 3501  | RM      | .3532             | LB               |
| 102787 | TUBE;       | P    | FT  | 3501  | RM      | 152.9508          | LB               |
| 104689 | RAKE        | M    | EA  | 3501  | 4501    | 173.2900          | LB               |
| 195746 | HH          | P    | EA  | 3501  | N&B     | .0700             | LB               |
| 195764 | NUT;        | P    | EA  | 3501  | N&B     | .0130             | LB               |
| 195902 | STAINLES    | P    | EA  | 3501  | N&B     | .0510             | LB               |
| 195916 | STAINLES    | P    | EA  | 3501  | N&B     | .1070             | LB               |
| 196006 | 3R5;        | P    | EA  | 3501  | N&B     | .1100             | LB               |
| 196024 | NUT;        | P    | EA  | 3501  | N&B     | .0200             | LB               |
| 700326 | HANGER;     | M    | EA  | 3501  | 4501    | 2.8689            | LB               |
| 701420 | RAKE        | M    | EA  | 3501  | RM      | 152.9508          | LB               |
| 701426 | RAKE        | M    | EA  | 3501  | RM      | 152.8604          | LB               |
| 701430 | RAKE        | M    | EA  | 3501  | RM      | .3532             | LB               |
| 701432 | RAKE        | M    | EA  | 3501  | 4501    | 2.5821            | LB               |
| 905089 | SIDE        | P    | EA  | 3501  | 4501    | .7087             | LB               |
| 905090 | SIDE        | P    | EA  | 3501  | 4501    | .7058             | LB               |

The rest of the tabs in PtekCAD operate just as the Part Load tab does. Revisions can be added/updated, as well as BOM and BOO records (*Please Note: We can easily put the BOM and BOO in the same tab. For this example, our customer wanted to control the BOM and BOO load separately*):

CAD Integration

File Path... CAD-PDM Integration Exa 5.csv

PartLoad **PartRev** BOM Load BOO Load

Process Revs... Update Existing:  Retrieve Revs...

| Revisions |                                     |                |        |         |                  |                 |            |            |
|-----------|-------------------------------------|----------------|--------|---------|------------------|-----------------|------------|------------|
| Part      | Approved                            | Effective Date | Draw   | Rev     | ShortDescription | Description     | CreatedBy  | CreatedOn  |
| 100840    | <input checked="" type="checkbox"/> | 12/30/2005     | 100840 | A       | ADDED            | ADDED           |            |            |
| 101029    | <input type="checkbox"/>            | 12/30/2005     | 101029 | A       | ADDED            | ADDED           |            |            |
| 101078    | <input checked="" type="checkbox"/> | 11/30/2005     |        | 1       |                  |                 |            |            |
| 101078    | <input checked="" type="checkbox"/> | 11/14/2022     | 101078 | A       | ADDED            | ADDED           | Controller | 11/14/2022 |
| 101083    | <input checked="" type="checkbox"/> | 11/30/2005     | 280-1  | 1       |                  |                 |            |            |
| 101083    | <input checked="" type="checkbox"/> | 11/14/2022     | 101083 | A       | ADDED            | ADDED           | Controller | 11/14/2022 |
| 101234    | <input checked="" type="checkbox"/> | 12/30/2005     | 101234 | A       | ADDED            | ADDED           |            |            |
| 102787    | <input checked="" type="checkbox"/> | 11/14/2022     | 102787 | A       | ADDED            | ADDED           | Controller | 11/14/2022 |
| 102787    | <input checked="" type="checkbox"/> | 12/20/2005     |        | V62     | 134269           | Added manufactu |            |            |
| 104689    | <input checked="" type="checkbox"/> | 11/30/2005     | 104689 | 1       | ADDED            | ADDED           |            |            |
| 104689    | <input checked="" type="checkbox"/> | 11/14/2022     | 104689 | A       | ADDED            | ADDED           | Controller | 11/14/2022 |
| 104689    | <input checked="" type="checkbox"/> | 01/27/2023     | 104689 | ColTest | ADDED            | ADDED           | Controller | 01/27/2023 |
| 104689    | <input checked="" type="checkbox"/> | 01/19/2023     | 104689 | Jer     | ADDED            | ADDED           | Controller | 01/19/2023 |
| 195746    | <input checked="" type="checkbox"/> | 02/18/2021     | 195746 | A       | ADDED            | ADDED           |            |            |
| 195764    | <input checked="" type="checkbox"/> | 02/18/2021     | 195764 | A       | ADDED            | ADDED           |            |            |
| 195902    | <input checked="" type="checkbox"/> | 02/18/2021     | 195902 | A       | ADDED            | ADDED           |            |            |
| 195916    | <input checked="" type="checkbox"/> | 02/18/2021     | 195916 | A       | ADDED            | ADDED           |            |            |
| 196006    | <input checked="" type="checkbox"/> | 02/18/2021     | 196006 | A       | ADDED            | ADDED           |            |            |
| 196024    | <input checked="" type="checkbox"/> | 02/18/2021     | 196024 | A       | ADDED            | ADDED           |            |            |
| 700326    | <input checked="" type="checkbox"/> | 11/14/2022     | 700326 | A       | ADDED            | ADDED           | Controller | 11/14/2022 |
| 700326    | <input checked="" type="checkbox"/> | 01/27/2023     | 700326 | ColTest | ADDED            | ADDED           | Controller | 01/27/2023 |
| 700326    | <input checked="" type="checkbox"/> | 01/19/2023     | 700326 | Jer     | ADDED            | ADDED           | Controller | 01/19/2023 |
| 701420    | <input checked="" type="checkbox"/> | 11/14/2022     | 701420 | A       | ADDED            | ADDED           | Controller | 11/14/2022 |
| 701420    | <input checked="" type="checkbox"/> | 01/27/2023     | 701420 | ColTest | ADDED            | ADDED           | Controller | 01/27/2023 |

CAD Integration

File Path... CAD-PDM Integration Exa 5.csv

PartLoad PartRev **BOM Load** BOO Load

Process BOMs... Update Existing:  Part/Rev... Part: 104689 Rev: Jer Clear... Retrieve BOM...

| BOM         |            |        |               |                   |             |          |                                     |                                     |                          |
|-------------|------------|--------|---------------|-------------------|-------------|----------|-------------------------------------|-------------------------------------|--------------------------|
| Parent Part | Parent Rev | MtlSeq | Material Part | Material Revision | Qty/Parent  | UOM Code | Pull as Assembly                    | View as Assembly                    | Plan As Assembly         |
| 104689      | Jer        | 10     | 701426        | Jer               | 1.00000000  | EA       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 104689      | Jer        | 20     | 100840        | A                 | 5.00000000  | EA       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 30     | 905089        | A                 | 1.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 40     | 905090        | A                 | 2.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 50     | 195902        | A                 | 5.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 60     | 195916        | A                 | 2.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 70     | 195746        | A                 | 8.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 80     | 196024        | A                 | 12.00000000 | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 90     | 195764        | A                 | 4.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 100    | 196006        | A                 | 4.00000000  | EA       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| 104689      | Jer        | 110    | 701432        | Jer               | 2.00000000  | EA       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

File Path... CAD-PDM Integration Exa 5.csv

PartLoad PartRev BOM Load **BOO Load**

Process BOOs... Update Existing:  Part/Rev... Part: 701432 Retrieve BOO...  
Rev: Jer Clear...

BOO

| Part   | Rev | Opr | Operation | OpDesc   |
|--------|-----|-----|-----------|----------|
| 701432 | Jer | 10  | Assy      | Assembly |
| 701432 | Jer | 20  | Assy      | Assembly |