Epicor
Sales Management

Driving revenue by inspiring business between you and your customers.

Epicor Sales Management

Epicor Sales Management delivers a comprehensive suite that enables you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill perfect orders that ensure world-class customer satisfaction.

By streamlining the sales process with centralized access to product, pricing, and customer information, orders can be generated with a minimal number of steps. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration and order entry, enabling you to improve sales productivity by increasing accuracy during the quote and order processes, and identifying the right solution to meet customers' needs.


- ▶ Estimate and Quote Management
- ▶ Order Management
- ▶ EDI/Demand Management
- ▶ Point of Sale
- ▶ Commerce Connect
- ▶ Mobile Sales Assist

Estimate and Quote Management

Easily generate and track all customer or prospect request for quotations (RFQs), from the time of receipt until an order is placed. You can get quotations out more quickly and be more accurate with pricing and lead times.

Estimating

Calculate material, subcontract, labor, and burden costs for multiple quantities of a part with information from the last time you quoted or ran the part, from a similar part, or from the Bill of Materials (BOM). Add any special charges (e.g., tooling or design). When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.
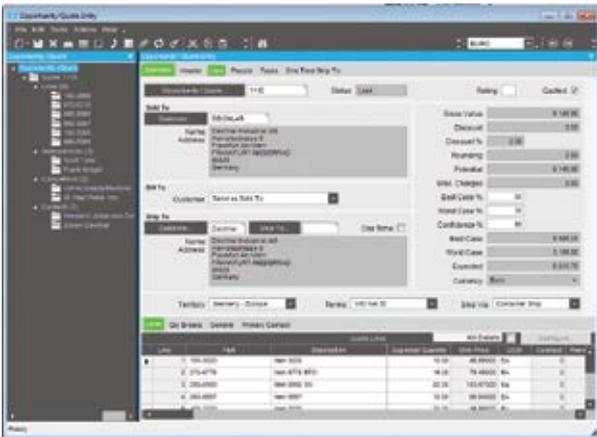
Generate accurate and timely estimates and quotes, and import data from a variety of customer and system sources.

Standard Routings

Pull same-as-except type parts into a quote, then modify them quickly and easily to create a new one.

Pipeline Management

Track confidence levels (e.g., best, worst, most likely) by quote line to accurately predict pipeline activity. Management override optimizes forecast accuracy.

Drag-And-Drop Interface

Use a tree interface to drag-and-drop components, operations or materials from another quote, BOM or previous job.

Realistic Cost Estimates

Perform realistic cost estimating with minimum lot charges, price breaks, and scrap factors on materials and subcontracting.

Inventory Availability

Check inventory availability during quote entry.

Request Supplier RFQ

Create RFQ requests to trigger buyers to solicit suppliers for pricing of materials required in the quote process. Review responses once submitted for inclusion in the estimate.

Markups

Specify and store individual markups for material class, subcontracting, operations, and special costs.

Order/Job Integration

Transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

- ▶ Push to an order by the line item
- ▶ Flag as won, automatically generating an order
- ▶ Pull from Order Management with flexibility to define specific lines and quantities desired

Part Advisor

Drill down into the quote/job/part status and history to answer critical questions related to a part:

- ▶ Have I quoted it before?
- ▶ Are there current orders for it?
- ▶ Have I run it before?
- ▶ Am I currently running it?
- ▶ Do I have any in inventory?
- ▶ Is part profitability available?

Prospects

Send quotes to prospects, even if they don't exist in the customer file.

Quote Tracker

Instantly query summary and detailed information on an estimate/quote.

Competitive Analysis

Track all competitors to find out where you are winning and why you may be losing.

Workflow

Manage the sales cycle with dynamic task lists that ensure the right people are working on the quote at the right time.

Part Cross-Reference

Cross-reference customer part numbers to your part numbers automatically during the quoting process.

Social Estimating

Connect with engineers and other subject matter experts from the field. Epicor Social Enterprise helps to drive more accurate and timely estimates by enabling groups of engineers to be part of a group that sales and estimators can collaborate with electronically. Share knowledge and discuss best options for customers leveraging up-to-date ERP information.

Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing perfect order fulfillment on demand.

With Order Management, all orders and change orders will be effectively managed online, perfecting the order-to-delivery process for maximum customer satisfaction.

Blanket Orders

Establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release.

Credit Checks

Check customer credit status online at quote entry, order entry, and shipment entry.

Multiple Ship-to Addresses

Track multiple ship-to addresses per order release.

Alternate Bill-to and Sold-to Customers

Application for payment may be required from a different customer than the customer order/receiving the goods or bill third-parties, such as a customer of your distributor.
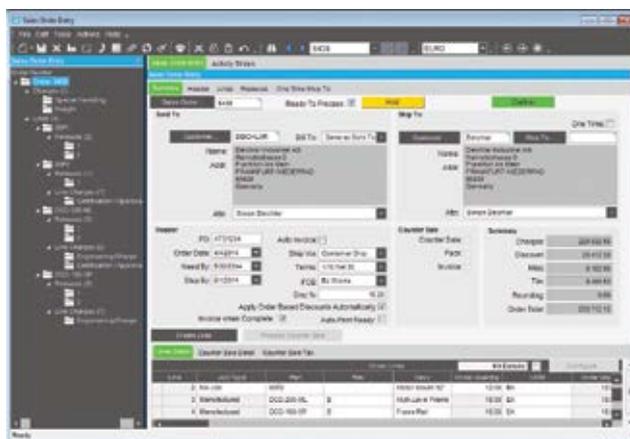
Manage sophisticated sales requirements from the time an order is entered until final shipment.

Ship From Multiple Locations

Ship an order from multiple plants and multiple warehouses.

One-Time Shipments

Do a one-time shipment to an address in Order Entry.

Fulfillment and Allocation Processing

Access to fulfillment and allocation processing within sales order processing. Use the Fulfillment Workbench for allocation or reservation and distribution processing, and plan for sales, transfers and job order types. Various fulfillment techniques, such as pick and pack, console-driven, and pre-pack processes may be performed through the use of templates to automate the fulfillment process for each. Hard allocation to finite level, versus reservations processing, may be launched directly from the order, line, and release areas as well. This feature also includes cross-docking capability.

Fulfillment Queue Management

Manage your work queues and assign tasks that are created by, but not limited to, the fulfillment-allocation process.

Choose whether the shop floor operates based on paper, or becomes a paperless operation with automatic user-assignments driven by the Material Queue.

Put Transaction Type

This transaction type is for all directed put-away transactions, including purchase order receipts, transfer receipts, RMA receipts and job receipts.

Pick Transaction Type

This transaction type is for all directed pick transactions. This includes sales order picks, issues to jobs, transfer picks, cross docking, and any bin-to-bin movement.

Pack TranVsaction Type

This transaction type tracks work station loads. During the pick process, the application calculates which suggested work station should pack the order based on load., then modify them quickly and easily to create a new one.

Fulfillment Queue Tracker

Use the Queue Tracker to view the status of put, pick, and pack transaction types. Managers can view all shop floor activity or filter on the various queue transaction types, each of which have unique identifiers. Warehouses and bins use attributes to identify what specific transactions need special equipment, and the Queue Tracker assigns only those resources or groups with the ability to operate the specialized machinery. Managers also create resources and groups and assign them transaction types and the priorities in which the transactions should be executed.

Drop Ship and Buy to Order

Provide the ability from within a sales order to define a part as being "Buy-to-Order." This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.

Cross-Docking

In conjunction with the fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from purchase orders or jobs directly to demand from sales orders, transfer orders, or jobs. When the cross-docked items arereceived, they are immediately directed to the demand they are linked to, minimizing the time and task to fulfill the order or job.

Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice.

Configure Sales Kit Components

Use the answers from the kit master to "on the fly" configure individual kit components, automating kit instructions for features like style, color, and size.

Configure a Kit within a Kit

Create a kit within a kit. Configure multilevel configured sales kits that include non-stock components generated on a job or purchased direct for the kit, alongside stocked components.

Backorders

Automatically create backorders for lines shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.

Sales Commission

Manage sales commission calculations for direct and indirect sales teams. Allocate commission percentage over multiple sales entities per order line.

Price Lists

Generate customer, product group, warehouse, and productspecific pricing hierarchies, while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.

Up-Sell, Cross-Sell, and Down-Sell

Improve order accuracy and ability to enhance sales with Up-sell, Cross-Sell, and Down-sell capabilities. At time of sales order entry, users are prompted with suggestions for "Upgrades," "Downgrades," "Substitutes," and "Complements." Whether substituting the original part with an upgrade or downgrade or adding complementary products; improved customer satisfaction alongside enhanced sales is the return.

Order-Based Discounts

Apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing.

Miscellaneous Charges

Enter unlimited miscellaneous charges or credits on each order header or order line. These charges will then print on the order and carry over to invoicing.

Order Tracker/Monitoring

Use order tracker to see a summarized view of the order, then drill down on selected items to see greater details (e.g.,lines, releases, shipments, charges, bookings, audit, and payment information). Use real-time data to link to other parts of the system.

Social Sales

Monitor/track changes to orders using Social Enterprise. Easily subscribe to notifications about changes to orders without building Business Process Management (BPM) controls. View a summary of all the changes to the order in an activity stream inside or outside Epicor ERP or receive social media style updates via Email or directly in your browser.
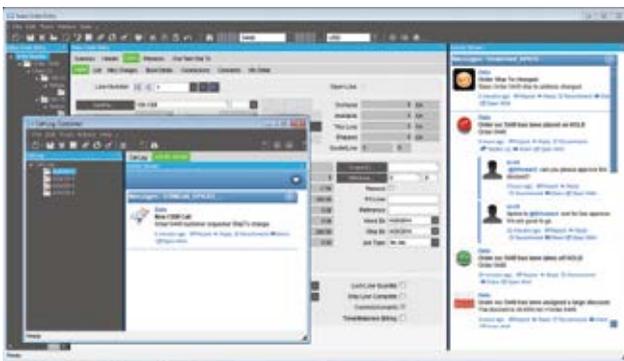
Easily monitor sales activity with Epicor Social Enterprise.

Copy Order and Build Order

Simplify repeat orders with the Copy Order function. Optionally build a new order from history. See previous orders and enter the quantity on the order form.

Capable-To-Promise

Provide accurate, real-time delivery dates to customers when using Advanced Planning and Scheduling (APS). Furnish a realistic promise date to your customer by finding out how a quote would fit into your current schedule.

Multilevel Capable-To-Promise

For multilevel structured products, Capable-To-Promise can be configured to create the sublevel assembly structures in addition to the top level assembly.

Available-To-Promise

View running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.

Order Job Wizard

Generate appropriate jobs for new orders in a single step that enables the user to create, plan, schedule, and release jobs against multiple lines and multiple releases.

Project Management

Link sales orders, jobs, purchase orders, field service calls, cases, tasks, milestones, ad budget information tomanage projects.

Counter Sales

Automate the pick-up, shipment, and generation of sales invoices for walk-in customers.

Tax Calculations

Tax calculations and fields are available at the sales order, line, and release levels.

Credit Card Processing

Epicor Credit Card Processing includes easy to use maintenance for initial setup along with a variety of integration points to bring an easily deployable solution to your business that meets the security guidelines as specified in the Payment Card Industry Data Security Standard including securely encrypted account numbers and key management. Epicor Sales Management uses Epicor Credit Card Processing to support authorization with the sales order, reauthorization with the sales order before picking and shipping, and complete or partial funds collected with the sales order.

EDI/Demand Management

Today, all suppliers large and small are facing increased expectations from their customers to have systems in place for immediate response to changes in their demand such as forecast and shipping schedule changes. Epicor EDI/Demand Management secures your competitive edge by incorporating electronic data interchange (EDI) with demand scheduling. The EDI/Demand Management framework leverages the SOA business architecture of Epicor ERP and deep industry experience in EDI to lower the cost of EDI deployment. The framework provides full flexibility and control for setting up customer contracts and handling their schedules once inside the Epicor ERP system, whether entered manually in Demand Management or contained in EDI messages. This helps your company reduce lead time and effort for planning and procurement, thus enabling you to respond on the production floor faster. A wide range of EDI implementation choices are available to match your company's needs, making it possible to preserve much of your investment in EDI setup and existing staff.
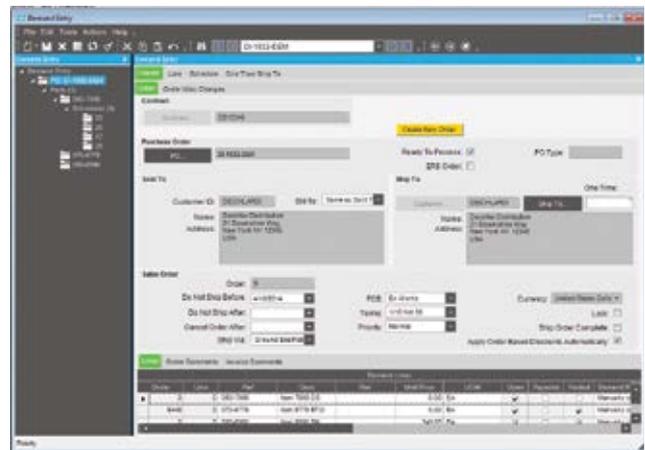
Demand Management

A component of the embedded EDI/Demand Management module, Demand Management starts with a "contract" set up per customer with such agreed-upon parameters as pricing, initial demand schedule, and contract end date. The contract is then linked to incoming purchase orders, forecasts, and shipping schedules. These contracts can be managed, and schedules produced, automatically with set periodicities or schedule constraints that match each customer's unique shipping needs. Additionally, as changes happen, the schedules can be updated,

and changes matched to existing sales orders, which are then updated accordingly. You can use Demand Management without EDI, and if EDI is deployed, your customers' electronic demand changes are brought in automatically for system review and acceptance into sales orders or forecasts in your Epicor ERP system, according to parameters and tolerances you specify. This is especially important for companies doing business in automotive as well as other industries such as industrial, consumer products, retail, and aerospace and defense.

Demand Contracts

Contract structure provides the ability to have many sales orders/lines attached to the contract.

Manage one inbound purchase order at a time, or options can be turned for more automated entry into the Epicor ERP system.

Demand Entry Management Console

Manage one inbound purchase order at a time, or options can be tuned for more automated entry into the Epicor ERP system.

Demand Tolerances

Enter settings per trading partner to include tolerances, such as for allowable time windows when schedule lines can be added or deleted or changed, tolerances for price variations, parameters for matching changes against existing sales orders, and functions for reconciling shipped quantities between you and your trading partner. Automated Demand Management processing can be set to always process in spite of tolerance errors, process with warnings, or stop when an error is encountered.

Demand Mass Review

Use Demand Mass Review to manually match incoming forecast and shipping schedule changes to existing forecasts and sales order lines in the Epicor ERP System. Configurable matching algorithms help speed up the matching process. Demand Mass Review also shows all the demand purchase orders from different trading partners competing for the same part and its on-hand quantities.

Schedules

Manually generate sales order release schedules based on defaulted customer periodicity (interval setup) and release quantity. Automatically close rejected schedules from the customer record.

Schedule Review

Review balances as well as proposed quantity of proposed schedule.

Cumulative Quantities (CUMs)

Manage and reconcile the cumulative shipped quantity. Validate cumulative quantity discrepancies by customer and choose to "Stop" or "Warn" and then allow the received demand to be turned into a valid sales order—this feature includes Cumulative Variances Reporting. The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulatives are tracked at the order and shipment levels over the life of the contract.

Forecast

Schedule forecasted deliveries that can be utilized with MRP to predict demand for resources and provide guidance on pending demand for materials.

Periodicity (Interval Setup)

Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.

Capable-to-Promise

Set up the system to review open contracts and capacity requirements for a product and automatically adjust the new demand requirements after reviewing against open contracts as well as available capacity.

Support for Allowance and Charge Codes

Optionally receive and process allowances and miscellaneous charges within EDI transmissions from trading partners. Both flat amounts and percentage based charges are available.

Automated Order Match Validation

Automatically cancel demand releases received that are not matched to a specific order release.

Close and Process Schedules

Use a single step to automatically close and process all schedules within Demand Management.

Contract Start and End

Manage contracts effectively with contract start and end date.

Electronic Data Interchange (EDI)

EDI is the traditional form of exchanging information electronically and is utilized by many suppliers to manage their supply chains more efficiently; reducing the turnaround time for such tasks as schedule changes and additions while eliminating potential manual data entry errors. As components of the embedded EDI/Demand Management module, EDI functions are tightly integrated with Demand Management and facilitate electronic communication of purchase order, forecasts, and shipping schedules from your customers into the Epicor ERP system. In addition, there are EDI functions to not only look at the demand side of EDI, but also focus on the fulfillment side with outbound Advanced Ship Notice (ASN) transactions, which can be reconciled in Demand Reconciliation with Cumulative totals (CUMs) reported back from your trading partner in an inbound EDI document. The rapid and accurate flow of information between your Epicor ERP system and your customer's via EDI will greatly elevate your supplier status.

EDI Standard Transactions

The Epicor ERP system framework readily supports the following listed standard ANSI X12 and EDIFACT documents. Many more are available from the Epicor EDI Solutions Team, who are experienced in making EDI work in various environments and can offer enhanced functionality that is tailored to the EDI needs of your business.

- ▶ Inbound Documents
  - Purchase Order (ORDERS, 850)
  - Planning Schedule (DELFOR, 830)
  - Shipping Schedule (DELJIT, 862)
  - Change Order (ORDCHG, 860)
- ▶ Outbound Documents
  - Purchase Order Acknowledgement (ORDRSP, 855)
  - Advanced Ship Notice (DESADV, 856)
  - Invoice (INVOIC, 810)
  - Purchase Order Change Acknowledgement (865)

TIE Kinetix® Software

Epicor has partnered with TIE Kinetix for close to 20 years to ensure close collaboration during implementation of EDI solutions. TIE's Business Integration products, including EDI translation software, support all industry B2B eCommerce standards, and communication and security infrastructures.

EDI Implementation Options

Epicor takes pride in the freedom of choice we offer our customers for their EDI implementations. Choose the level of assistance you need from the Epicor EDI Solutions Team; such as having them train your team in Demand Management setup and operation and then build and customize all your EDI maps for you to simply train your team on the Epicor solution for EDI so they can self-serve your business EDI needs. Also, in addition to the Epicor offered Tie Kinetix translation software, your existing Enterprise-Class EDI translation software can be used.

EDI Managed Services

Epicor offers its own VAN (value added network) service that supports millions of transactions daily. In addition to this service offering, TIE Hosted Services are available for the EDI message translations. The benefit of combining these solutions includes significant savings in VAN fees and low up-front setup fees for TIE Kinetix translation software. A small Tie Communications package is the only on-premises EDI software needed.

Direct Import Demand Workbench

Import EDI messages from the VAN and translation software directly into the Epicor ERP system without middleware, and review them for errors in a user-friendly format before committing them to your production environment. In the Demand Workbench, easily correct common errors such as a bad contract ID or trading partner ID before sending on for processing.

Acceptance Status

Automatically track functional acceptance status of EDI documents, including acceptance, rejection, and partial acceptance of outbound documents through receipt of functional acknowledgements from trading partners.

Evaluated Receipt Settlement (ERS) or Pay on Receipt (POR)

Improve cash flow by providing ASN data elements required by trading partners for ERS/POR functionality, enabling your trading partner to send back a Cash Application Advice EDI document (REMADV, 820) to process the cash application.

EDI Capable to Promise

Prevent your ERP system from making promises to your trading partner that you can't keep. A very powerful EDI/Demand Management feature is the Capable to Promise function you can turn on for specific trading partners, to first check your available stock and resources against each EDI message that comes in. If not enough resources are available to make and ship the product by the date requested, then the line is optionally adjusted, preventing an inaccurate purchase order acknowledgement from being sent to the trading partner and the costly fines that go with delayed order fulfillment.

Configuration Details

Automatically receive and pass configuration details for configurable parts from automated EDI transactions through Demand Management to order processing.

Automated Order and Forecast Acceptance

Specify customers who can bypass manual review of incoming EDI documents in favor of automated receipt of un-firm or firm orders and changes based on predefined customer attributes.

Service Connect With .NET References for Custom EDI Processing

Epicor Service Connect consists of security, messaging, workflow orchestration, transformation, scheduling, notification, and exception handling, with .NET references and/or web service components. While the Direct Import functionality included with EDI/Demand Management is used to accept EDI standard transactions, Service Connect can be used to set up automated EDI processing for other non-standard EDI transactions. A runtime version of Service Connect is included with Epicor, or you can purchase a full-developer Service Connect license if you wish to develop your own workflows in-house.

Point of Sale

Staying ahead of the ever increasing expectations of customers and employees in today's fast-paced retail environment can be your most effective competitive advantage. Epicor Point of Sale (POS) is designed to empower your organization with the ability to exceed these expectations, extending the power of your Epicor ERP solution to a customer-facing sales environment. Epicor provides POS solutions to organizations with a single POS station to large, multinational chains with hundreds of stores.

Epicor POS is a feature-rich store system that empowers store personnel to provide enhanced customer experience. Comprehensive functionality include electronic gift cards, gift receipting, customized receipt per transaction type, coupon redemption/issuance, layaways, special orders, suspend and resume, item marking for various functions, additional input fields, multicurrency, start/end of day functions, cash management, and more.

Commerce Connect

The increasing proliferation of eCommerce likely means that more of your customers are looking online to solve their business problems, which means that providing customers with the ability to buy online from you is just a start. Your Web site must provide an experience that truly does solve problems, or better yet, inspires them in some way to keep coming back. Whether your Web site serves Business-to-Consumer (B2C), Business-to-Business (B2B), or both needs, it requires strong functionality and must use the latest technology to deliver customers the best possible online experience. Epicor Commerce Connect provides everything your Web site needs to deliver a rich customer experience, throughout the customer's entire order life cycle—from quote to fulfilment to service.

The key advantage of Epicor Commerce Connect (ECC) is its deep integration to Epicor ERP. Site management—making sure that every part is displayed, listed, and priced correctly to the right customers—can be a complex task that often requires significant resources to manage, and any small errors that occur can quickly lead to customer dissatisfaction. Epicor Commerce Connect negates much of the risk that goes with using a nonintegrated eCommerce solution by getting all of its information direct from Epicor ERP. All transactional data flows seamlessly between Epicor Commerce Connect and Epicor ERP: product information, customer specific pricing, inventory levels, and more, can be viewed online via Epicor Commerce Connect.

Epicor Commerce Connect extends business boundaries with a proven commerce architecture that connects your business to consumers, customers, and suppliers. Epicor Commerce Connect enables you to utilize your Web site to drive revenue, increase customer satisfaction, and grow your business. Natively integrated with your Epicor ERP solution, Epicor Commerce Connect reduces the time to setup a customized, attractive and simple to use Web site. While many companies can provide eCommerce services, very few are able to deliver the value and rapid results the way that Epicor Commerce Connect can.
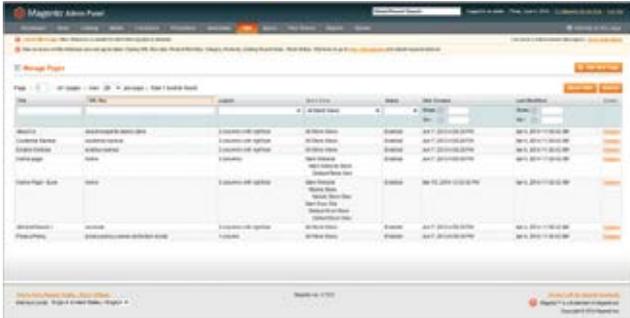
Commerce Connect provides a rich framework for building a Web presence and simplifies doing business Online.

A Modular Approach to a Better Web site

Whether you are selling to the general public, or to other businesses, Epicor Commerce Connect has been designed to help you provide all visitors to your site(s) with the same high levels of user experience they have come to expect in today's online environment. Browsing tools such as configurable search, suggested items and automatically updated listings of popular products on your site are able to help your customers very quickly get to the items they wish to purchase, while at the same time ensuring that they are exposed to as much of your product range as possible—all in ways that are relevant and tailored to customer interests.

You can also provide tools to help your customers make better purchasing decisions. For example, letting customers see related products, compare different products or simply view the product up close using the product image zoom-in capability. Tools such as these allow the customer to make better purchase decisions, which in turn lead to much higher levels of customer satisfaction and a lower rate of product returns.

Configurator

Many businesses sell products that can be customized - for example by color, size, material and much more. With products such as these, the number of possible combinations the customer could choose can rapidly rise to the thousands, or more. To help manage this complexity, Epicor Commerce Connect includes a configurator module that provides a fast and efficient mechanism to display all product options on one page—allowing your customers to simply and easily choose their own product specifications without the stress of having

to navigate through multiple different pages to find the combination that best meets their needs.

Fully integrated with Commerce Connect, Epicor Product Configurator enables Web-based configurations that can be used for quoting and pricing within the Epicor Commerce Connect solution. Once configurations are accepted by your customer, the instant flow to Epicor ERP enables not only price, but also product build to be delivered for more rapid response to new orders. Use the robust configuration capabilities and extend them to your customers and channel to ensure that customer requirements are met. Parametric capabilities enable visual confirmation of configuration results.

Supplier Connect

Epicor Commerce Connect can also provide a Web site for your suppliers, providing online self-service on a whole range of enquiries—such as open orders, part information and access to invoice and payment history. This is one way to reduce or eliminate time spent on enquiries that come in via email, phone, or fax, and can significantly increase the amount of time workers have to spend on other tasks. Supplier Connect creates a more seamless relationship between you and your suppliers, and allows for your business to react much more quickly and accurately to any change of circumstances.
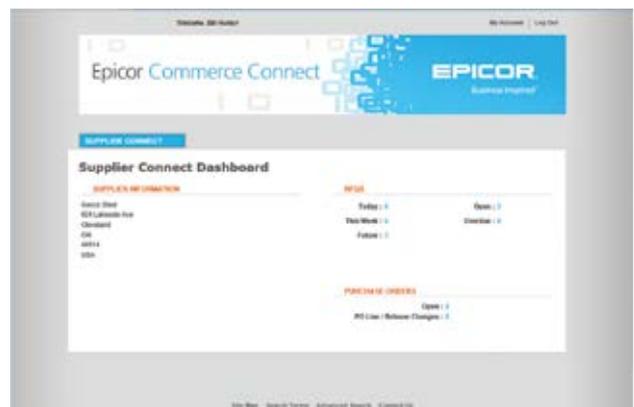
Reduce lead time on purchases by communicating in real time with suppliers on schedule changes, new purchase orders, pricing requests, shipment performance and more—right from your Web site.

General Information page

An informational page with supplier information (based on log in information), including open and overdue request for quotes (RFQs), and the number of open purchase orders and PO line/release changes. Suppliers can manage RFQs and POs from separate pages within the site.

Supplier Account Management

Enable suppliers to manage their own passwords, company information and contact information without the need for overthe-phone assistance.

Purchase Order Management

Suppliers are able to confirm new purchases orders or confirm changes to existing purchase orders.

Supplier Request for Quote

Allow suppliers to respond electronically with pricing for RFQs.

Supplier Inquiries

Save time answering supplier inquiries by letting them access information on parts, open and historical orders, invoices and payments online.

Fully integrated with your Epicor ERP

An online storefront cannot offer maximum value to your organization unless it is fully integrated to your ERP, and operating these systems independently should not even be an option in today's fast-paced business climate. Epicor understands this challenge well and believes that there is a very real competitive edge to be gained by having tightly integrated systems. Epicor Commerce Connect is fully integrated to Epicor ERP, ensuring that stock information on your site is always up to date, and that any transaction completed online is immediately recorded throughout the business system. Further value of the integration is the avoidance of redundant data entry, which means fewer errors, better accuracy and lower overall transactional costs.

Going Mobile

The ubiquity of smartphone and tablet devices means that your Web site must be able to reach people on the go. Epicor Commerce Connect provides gateways to Android and iOS devices with responsive design that automatically formats your site to the size of the screen, thus enabling fast, efficient browsing, and an optimal user experience on today's most popular mobile devices.

Easy to Extend

Constant innovation, the pace of change and your customer's ever evolving expectations mean that the challenge of providing relevant, fresh online experiences is ongoing. Your Web site is a key part of your brand, is the virtual face of your organization, and is a powerful transaction engine that drives revenue. Epicor has leveraged the power of Magento's world class content management system (CMS) to help you develop unique Web sites quickly and manage them easily. Epicor Commerce Connect allows you to fully exploit the capabilities of Magento's powerful CMS capabilities as well as leverage the full scope of specialized applications available in the Magento App store.

Customer Connect

Business customers have expectations that are influenced by all online experiences, so they require the same ease of use provided by top consumer Web sites. Additionally, they will have other requirements such as being able to view special promotions and pricelists, make repeat purchases and pay on account. Epicor Commerce Connect has been built especially with these requirements in mind and provides frictionless purchasing from your B2B customer Web site.

Always a click away, Customer Connect gives B2B customers access to account-specific information directly from your Web site. Whether ordering a replacement part, checking on the status of a shipment, or payment history, Customer Connect extends your level of service to customers.

Shopping Basket

Similar to the "basket" concept used on consumer sites, you can search and add products to the shopping basket and update or remove items. View number of items in the basket and the basket subtotal, and if necessary you can drill down on a specific part number to bring up a new screen with all product information. Once ready, the user can check out through the ship method-billing-order preview-confirmation process.

Product Search

Search will return all items marked as Web Saleable in the ERP and can also be performed by Product Group.

Quick Purchase

Allows the user to key in a part number with quantity and add to basket or add to quick list

RFQ

Customers can request a quote to be created for the information listed in the RFQ form.

Customer History

Customers can view history by order, shipment, invoice, payment, returns authorization, service call with drill-down into the actual transactions.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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