

Eagle SMB Overview

Welcome to the Epicor family!

We're really excited about your choice to move forward with Eagle Retail Management software and we want to make the transition as smooth as possible.

This is a team effort, so we need your help!

We need your commitment to follow the recommended steps to get the most from your Epicor Learning Center experience.

In the topics that follow, we'll show you what to expect over the next few weeks and give you an overview of who will help you throughout this process.

We'll show you some steps you can take to create the best training environment, look at your assigned Agendas on the Epicor Learning Center, discuss Hardware Installation, Credit Card processing, and printed forms.

We have a lot to talk about so let's get started!

Topics

- Your Epicor Team
- Your Training Environment
- Assigned Agendas
- Hardware Installation
- Miscellaneous

Your Epicor Team

Now let's look at the team that will help get you ready to use your Eagle system.

First is your Customer Account Manager.

This is the person you worked with when you purchased your Small-Medium Business, or SMB, Eagle System.

We designed the SMB program to help you begin running Point of Sale and some basic inventory functions within a six-week implementation window.

You can always reach your Customer Account Manager at 888.463.4700.

We also assign you a Project Manager. This is your main contact throughout the implementation process.

The Project Manager is responsible for creating your implementation calendar.

They'll schedule a planning call to introduce you to other team members and check in throughout the implementation process.

Another team member is the Content Review Coordinator. He or she will meet with you several times a week by phone to answer questions you develop as you work your way through the Epicor Learning Center courses.

They'll schedule these times on your implementation calendar.

You'll also have a Local Platform Specialist, or LPS, assigned to assist with hardware installation and other technical computer, network, and connectivity questions.

We'll discuss their role in more detail later in this course.

And finally, if you're converting data from an existing computer system, you'll work with our Data Conversion Tem.

They'll help map the fields on your current system to the corresponding fields on the Eagle system and convert the actual data.

You'll see data conversion events listed on your implementation calendar as 1st Data Drop, Mock Data Drop, and Live Data Drop.

Your Training Environment

Your training environment is very important to the success of your implementation.

We know you have a business to run and that the time you have for training is a luxury.

To make the most of your training time, schedule dedicated time to work through training modules and be sure you can do it in a quiet area free of distractions.

Most training modules include a short test. It's important that you complete the test after each module and to practice the exercises on your Eagle system.

The time you invest in the training process now will really pay off once you're live on your Eagle system.

Assigned Agendas

Recently, you received an email regarding your Epicor Learning Center User Name and Password.

This is the information you entered today to view this course.

You can log in from any PC, at any location where you're connected to the internet.

The web address is: ondemand.epicor.com

Let's look at some other areas of the Epicor Learning Center that you'll be using over the next few weeks.

As an SMB customer, you're assigned some specific Agendas.

An Agenda is a series of Courses and Tests. They're listed in a specific order and should be viewed in that same order.

This way, you're building the foundation for the next topic.

You'll receive a copy of the Training on Demand Agenda from your Project Manager.

It lists all the required courses, with the expected Start Date and Due Date. You could even use it as a checklist as you complete the courses.

It's a good idea to print a copy and keep it handy as you work through the implementation.

Let's take a moment to look at Epicor Learning Center's assignments.

When you open the menu and select My Assignments, you can see all your assignments, any open assignments or assignments you haven't completed, and agendas.

When I select Agendas, I get a list of Agenda items to complete.

Notice that they all have start dates.

In your case, the dates will correspond to your Implementation Calendar.

When you select an agenda in the list, such as SMB Getting Started, you'll see a list of all the courses included in the agenda.

Again, it's really important that you take and complete the courses and tests in the order presented in each agenda.

Sticking to this routine and schedule means you'll be well-prepared for your designated go-live target date.

Hardware Installation

Let's review the process so far.

You placed your order with your Customer Account Manager.

Your Project Manager may have already contacted you to start the implementation and give you all the necessary details. If not, they will be in touch soon.

You have your Username and Password to begin using the Epicor Learning Center.

At this point, your hardware should have arrived or be on its way and you'll need to verify a few items to get it installed properly.

Remember, we can assist with the installation of your hardware and configure your network to meet the system requirements.

We are also available to talk with your electrician to make sure your site is wired properly.

Your Local Platform Specialist, or LPS, is available to help with the hardware aspects of your Eagle system.

Be sure to review your Statement of Work or SOW for full details.

If you don't have a copy, you can get one from your Customer Account Representative or Project Manager.

Some simple preparation before Go Live assures that your PC's and peripheral devices are ready to go.

Miscellaneous

Now that you know who will be helping with your implementation and what some of your responsibilities will be, we need your help with a few more items.

Credit Card Processing and the ordering of forms or Business Products requires some lead time, so let's look at each of these.

Depending on the type of credit card processing you have selected, you'll need to make sure the bank and/or processor is working diligently to prepare your account.

Epicor will contact you to provide the training directly related to credit cards and your Eagle system.

The Implementation Calendar you received from your Project Manager will identify the specific week that this will occur.

Stay in contact to ensure that credit card files and hardware are set up and tested.

Your Local Platform Specialist will setup any signature capture pads. The Credit Card team will contact you for initial setup and training on your Eagle System.

One item to consider is preprinted forms.

Eagle can print to plain paper and to single and multi-part forms.

Your Business Products representative, identified on your Contact List, will review your options and place any needed orders.

Be sure to note the related date on your Implementation Calendar.

We're really pleased that you decided to become a part of the Epicor family.

We're here to help you move through the SMB implementation process smoothly and on target.

By understanding the overall process, you'll be well prepared and able to keep your staff informed and on task.

Review this course as many times as needed and never hesitate to ask questions of your Epicor Team.

In a few short weeks you'll be live on your Eagle system, managing your inventory, and using the limitless tools available to grow your business.

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Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684

Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298