

# Setting Up Companies, Stores, and Regions

Defining your business entity begins with your company name and contact information. That company may or may not consist of several store locations. And those stores might need to be organized into regions or store groups.

In this course, we show how to set up a company, a region, a store, and a store group.

## Objectives

- Set Up a Company
- Set Up a Region
- Set Up a Store
- Set Up a Store Group

## Set Up a Company

From the main screen, select the *Admin* icon and choose Organization Maintenance. Epicor creates an initial company, region, and store when you purchase the software.

Select *Company* and then choose the *Add* icon.

Enter a company name and company number associated with the company. The company number may contain up to six digits.

Select *Save* to save the company.

Add the company address. Fill in the required information denoted with the red asterisk.

The Address Description could be location or type. For example, the location may be most familiar to employees as something like *the old warehouse* or the former bank building.

Toggle the *Primary* switch to yes if the address you entered is the company primary address.

When finished, select *OK*, then choose *Save* to save the changes.

Once saved, the address displays in the Company Address section.

## Set Up a Region

From the main screen, select the *Admin* icon and choose *Organization Maintenance*.

Select *Regions*. Choose the *Add* icon on the Regions page to add a region.

On the Add New Region window, use the drop-down list in the *Select Company* field to choose a company and then enter a Region name.

For example, if you have 10 locations and 3 are in the Northwest part of the state, you can name your region accordingly.

If you already have stores set up, select them from the drop-down list.

Every store should have a region assigned to it. This is used primarily for reporting purposes. You cannot add stores already assigned to different regions.

Choose *OK*.

Select *Save* to save the changes.

## Set Up a Store

From the main screen, select the *Admin* icon and choose *Organization Maintenance*.

Select *Stores* and choose the *Add* icon to display the *Add New Store* page.

Fill in the required information denoted with the red asterisk.

Enter the default point-of-sale customer name.

For example, entering *Cash Customer* for walk-in customers shows this name on the point-of-sale screen.

Enter the *Default Location Code for Receiving*. This may be your receiving dock or a staging location in your warehouse used to unpackage items before putting them away in their normal storage locations. The *Default Location* only applies when receiving items with blank location codes.

Select *Save & Add More* to add more stores.

When finished, select *Save & Edit* to save and proceed to the Edit section.

The Edit section opens to the Store Information tab. Update this information as necessary.

To add store addresses, select the *Store Address* tab and choose the *Add* icon.

On the Add Store Address page, fill in the required information denoted with the red asterisk.

Enable the *Primary* toggle switch if the address you entered is the primary address of the store.

When finished, select *OK*.

On the Store Hours tab, select the time zone from the drop-down menu, toggle the *Closed?* switch for days the store is closed, and then enter the regular hours for the store.

When finished, select *Save*.

## Set Up a Store Group

Add a store group if you want to categorize your stores.

For example, you can have *Chicago Area Stores* to categorize all the stores in this region.

From the main screen, select the *Admin* icon and choose *Organization Maintenance*.

Select *Store Groups*.

Select the *Add* icon to display the *Add New Store Group* page.

In the *Store Group Name* field, enter a name for the group.

Store Group Names must have at least two characters.

Select the stores to add to this group from the drop-down menu.

When finished, choose *Save*.

## Recap

As you can see, setting up companies, regions, stores, and store groups are straightforward processes.

For more information on these and other topics, refer to online Help.

In this course, we showed how to set up a company, a region, a store, and a store group.

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