Welcome to Propello

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An easy to use, innovative POS and retail management platform built and backed by one of the most experienced software providers in the industry.

Let's meet the Epicor team will be helping you implement and maintain your software, see how the various applications work together to manage all aspects of your business and the wealth of training and onboarding tools available to you right in the product

Objectives

- Your Epicor Team
- Application Workflow Relationships
- Using Your Help Resources

Your Epicor Team

You have a whole team of Epicor folks working toward your success!

You already worked with your customer account manager. They are ready to help make sure you have the applications you need and answer any sales related questions you might have.

Set up, planning and training are all handled by professional services. This group of seasoned trainers and project managers are here to move you through the implementation process.

They may work with our credit card team to set up payment processing or an HSS, hardware services and support tech to connect devices. These are all Epicor employees with the same mission – to help you succeed.

Once you are live on your Propello site, our support team is there to assist you with questions.

Remember, help is always right at your fingertips, but the experts are just a chat, email or phone call away.

Finally, we are always striving to make your experience better, and our product development team is busy using years of industry expertise to add new features and enhance existing ones.

When a new release is accessible that will be communicated in the software, via email and announcements and a full list of all updates will be readily available.

Whether it's an account manager, trainer, project manager, set up team, support agent or developer – we are all here to guide you and ensure your success with Epicor

Application Workflow Relationships

The retail industry has many moving parts.

Powerful analytical tools are built into key functions like inventory, sales tracking, and customer management.

The insights you gain will help you make smarter merchandising, pricing, and promotion decisions.

Let's examine how these applications work together in Propello to improve organizational performance and cost control.

Propello allows you to manage inventory levels with intelligent and digital ordering processes.

The Product application contains your item information, your buying and selling specifications, retail pricing and costs along with critical historical data.

A product will have one or more suppliers.

Those suppliers may require a minimum amount of product to be ordered and will most likely use a specific unit of measure to order from them.

For example, an item may be purchased by the Each or only in a Roll.

All of this information is stored in the Product record.

When a purchase order for a supplier is created and then the merchandise is received, the quantity on hand in the product is increased.

When products are sold a point of sale, the quantity is reduced. Pretty basic stuff, right?

The powerful and important part is you can use that history to automatically keep your products at a certain quantity level; the optimum level.

Your sales history drives the ability to use sales forecasting and in turn, create order points.

Order points are the foundation for a suggested order as they determine what quantity on hand level triggers a purchase.

When the merchandise arrives and you finalize the receipt, quantities, and more importantly costs, are updated on the product.

Supplier price changes can also be easily imported and maintained so that pricing on the shelf or online, meets your margin requirements.

In return, your reports and dashboards will reflect accurate figures and trends.

The other big impact of a POS system is being able to view and utilize your customers sales history.

You can monitor customer activity and offer customized loyalty incentives and promotions.

If you extend credit to your clients, that can all be managed with full payment application and statement generation.

The ability to control these key areas of your retail business:

Products, Suppliers, Customers, POS

Is the key to better decision making and planning.

Utilizing all of the available Propello features can help you drive revenue, grow your business and increase profitability.

Using Your Help Resources

Because it's built specifically for cloud and mobile technology, Propello software offers a range of complementary tools designed to provide

just the right amount of help and guidance to each user.

Use the search to locate knowledge-based articles, short concise videos and guided learning flows.

These are step by step notes to walk you through a process right in your site.

The articles open a tool with even more search functionality and offers you related documentation.

Use quotes to locate exact strings.

What you see here is based on the applications you have licensed to your user and your user permissions.

If I choose Getting Started Tasks, I have a contextual list of training that keeps track of what I complete.

So, if I am involved in Purchasing, I see a list of topics related to that function. I can take them in order, and each is crossed out as I finish.

I even have guided learning to help me create a new purchase order.

I even get to choose how much help I want. If I think I can fill this out, I can just go ahead. But if I want step by step assistance here, I just click this icon here.

This is a great tool for new users and new employees – but also perfect for those tasks you only do once in a while.

There are also some great shortcuts in the Help.

Notice this Where Do I section.

All of these shuttles take you to the right page, to perform the action.

There are some important support contact links here and even a survey so you can give us your feedback.

Recap

You just learned about your Epicor team who is here to help you succeed, from professional services to support.

How to leverage our application workflow relationships to make the best use of smart information and how to make use of our help system to get access to guided learning flows, knowledge articles, and videos.

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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