ECC Configuration, Product Setup, and Themes

Welcome to ECC Configuration, Product Setup and Themes. By the end of this course…
You'll be aware of specific prerequisites for configuring ECC with Kinetic, Prophet 21, and Eclipse customers. Be able to explain configuration scopes and which elements can vary between stores, sites, and views. Be able to locate, understand and configure key system attributes. As well as setting up the Quick Order Pad. Lastly, we'll take a quick look at modifying site themes.

As we go through this course, we will be referencing these documents:

- ECC Implementation Guide
- ECC Install and Upgrade Guide.

Use this course in conjunction with those documents. From time to time, we will refer to them.
Select an option to get started.

Objectives

- Configuration Preparation
- Configuration Scopes
- System Attributes
- Quick Order Pad
- Themes

Configuration Preparation

Before configuring your ERP system, you must install and connect ECC to your existing ERP system. The requirements for each are found in the Appendices of the Installation and Upgrade Guide. Be aware that Prophet 21 and Eclipse both require a middleware API that the customer is responsible for setting up.

Customers find the middleware install instructions and software on the customer portal. They must login to access this material.

To choose which products, contacts, and ERP accounts sync from the connected system, you must web enable the entries you wish to include.

Each ERP controls this differently. For example, with Kinetic, products must have the Web Saleable box checked.

Find the specifics for each platform in the corresponding appendix.

Each of the ERP systems requires some setup for the attributes to be included in ECC. These vary based on the system you're connecting to.

For example Kinetic has the option to send user defined (or UD) fields along with the fields from the attribute tab.

Eclipse can send any fields from the prod.class table (UD fields), standard item maintenance fields, or PDW data, and P21 can use UD or standard fields from the inv_mast table.

Refer to each appendix for the specific requirements for each data and attribute.

Once you've made the appropriate preparations, complete the Quickstart panel setup. Find details on this process in the Installing ECC Base course in ELC and in the Implementation Guide documentation.

If you run into connection issues during this process, two of the most common causes include:

Did the customer receive the correct ECC license version?

Are they using a 3rd parting hosting service? That can cause complications on a case by case basis.

Select Continue to move onto the first knowledge check!

Configuration Scopes

ECC can be set up to contain multiple sites.

Each site may contain multiple stores, and different views can be configured for users viewing a specific store.

Adjust the Configuration Scope to control which of these levels you modify.

Limitations exist that control what is shared between sites, stores, and views.

Scopes define and clarify those limitations.

For example, each site has a distinct URL and an assigned Base Currency. Stores each have a unique product catalog and views can be linked to a specific language or currency.

While on certain configuration screens in the Admin Site, you can set the configuration scope for the page you are on using the dropdown in the top left of the screen.

To find additional details on Scopes, select the Question Mark icon next to the dropdown, or review the Implementation Guide section: Configuration Scopes.

The Global installation scope affects everything in the system. In it, you define a single system currency, define products, and set base pricing based on the global currency.

Add or modify Websites, Stores and Store views to use as Scopes from the Stores > All Stores page.

Use the corresponding button to create a new scope or select one from the list to modify its details.

You can add and modify sites from the Stores menu under Sites.

A site contains a distinct URL. You can adjust brand settings for this level that apply to stores and views held within.

Sites have a site-based currency with a set of supported currencies that get converted to the base during a transaction or payment.

Note that products only display if you assign a price to them in the defined site-based currency.

you can restrict which countries can purchase from a specific site or store under Epicor> Configuration > General > General > Country Options.

You can configure specific store displays that are all subsets of the Site.

These stores can have their own specific catalogues and distinct brand settings.

Manage your store settings and themes under the Stores menu.

You may assign each view it's own language.

Views may have one or more display currencies. If the prices are not displayed in the site-based currency, they are calculated from the base currency according to the exchange rate.

Select the right arrow icon to continue.

System Attributes

Many attributes and details in ECC sync from the connected ERP system.

To ensure you map your attributes correctly for that sync, review the implementation guide and data mapping training in ELC. We won't cover that here.

Here we'll look at where to find attributes and settings and describe their uses.

To access and configure product attributes, select Stores and choose Product.

Here you can add or edit attributes and control what fields are available, such as brand, condition, or description.

Entries with an Attribute Code that contain the prefix ecc_ (read as "ECC Underscore") are Magento system attributes and are set as a text field type. You cannot delete system attributes and are limited in how you can modify them. That means if you want to use a System Attribute as a filter option, you cannot. Instead, you'll need to create a new attribute to use in its place, and set the Type to dropdown. Then, in Storefront Properties, you can set Use in Layered Navigation to Yes, and they'll appear as a filter category on the webpage.

You can view and manage products and categories under the Catalog menu.

Here we see the synced products listed.

Products sync from the ERP with a SKU and name. Note that P21 uses the same entry for SKU and Product Name. A description also syncs over, but often customers choose to manage that in ECC since they may not use it internally.

Note that in some situations the customer may choose to manage fields in ECC or Create a UD field in the ERP to map to a standard field in Magento. (Epicor > Mapping: Type - data mapping)

Be aware that for P21 and Eclipse, for product images, the file name will be transferred over, but the actual file must be uploaded into ECC.

Kinetic customers can automate the image sync by including 1 image per product if the image is stored on the part record in Kinetic. The image is not required in the Magento database.

Now let's look at Catalog > Categories

These are departments or product divisions that are brought over from the connected ERP.

From Prophet 21, by default, these sync from Item Category Maintenance, for Eclipse, it's part of Web Drills, and in Kinetic, they're associated with Product Groups.

Note that Eclipse and P21 allow you to have multiple levels of product groups, but Kinetic only permits top level categories. To see the details for a specific platform, refer to the corresponding appendix in the Installation and Update Guide.

You can add categories here or rearrange them by dragging and dropping.

By default, for Kinetic and Eclipse ECC categories Sync the Category Name, and the ERP Code. for P21, it Syncs the Category Name, ERP Code, Description, and Image.

In ECC, the term Customer refers to either login accounts made through the ECC webpage or Contacts synced from the connected ERP system that have an associated email address.

Locate this Attributes View under Customers > All Customers.

Customers associated with an ERP Account from the connected ERP sync over already connected. The Short Code column refers to the ERP Account that the customer belongs to.

To modify or view settings for a specific customer, select the corresponding row. Let’s open Andrew Addisen.

If you want to override system defaults use the Account Information Tab. Here you override defaults regarding areas like Show Customer Price, Allow Backorders, and bill of material options.

If instead you want to modify options and functions for all customers or groups of customers, navigate to stores > Configuration > Customers > Customer Configuration.

Use the scope setting to control the range of customers to apply the changes to.*

You can control various options for Customers like what menu options customers see, details regarding creating new accounts, or even password requirements.

ERP Accounts refer to Customer Company Accounts from the connected ERP.

Take note not to confuse these with Customers in ECC.

Find ERP Accounts under Epicor > ERP Accounts.

Some of the ERP Account details pulled from the connected ERP include company, ERP Account Number, and Short Code.

Select an entry to view the account details.

The details tab includes the ERP Account information and allows you to override system default settings like allowing backorders or Branch Pickups.

Access Sales Rep Configuration by opening the Epicor menu and choosing Sales Rep Accounts.

Sales Rep Accounts sync from the ERP and each rep’s login comes from the corresponding contact records with email addresses attached to that account in the ERP.

The Sales Rep Account Number and Name sync from the connected ERP. You can also create new unique entries for use in ECC. One example would be to create a Sales Rep Account for Customer Service. *

Sales rep accounts sync from the ERP, the rep login is synced from the email on their web enabled contact record.

Once you select a record, use the ERP accounts tab, to assign specific ERP accounts to a Sales Rep account. This grants users assigned to this account access to all information for those ERP accounts.

It also gives them the functionality to masquerade as an account… that is to view the website as if they were that customer.

The Sales Reps tab permits you to assign people to that Sales Rep Account. When any of the customers assigned as a sales rep logs in, they view the website as a Sales Rep.

Pricing Rules allow sales reps to apply a specific discount to the order that they are placing on behalf of the customer. This can be based on a percentage above the cost price, down to a percentage below the customers special price or down to percentage below the base price.

The date range controls how long a pricing rule is active. Once it expires, the Sales rep can no longer use the Pricing Rule to discount a customer's order.

If you want, you can establish a parent/child hierarchy of Sales Rep Accounts to control access and visibility. This allows you to set up a manager as a parent to access and manage their reps' accounts.

Lists group and organize items for special purposes. They may contain a list of favorite items for a customer or you may put related items together to simplify customer searching or even assign items that have legal requirements to a restricted list.

Lists can be found under the Epicor Menu. Refer to the Lists section in the Implementation guide for additional details.

Choose Add New List to create one or select a list from the viewer to configure its details. Once you save a list, select it to configure it.

For each list, you assign one of several list types to the created list:

Favorites

Predefined Lists

Price Lists

Product Group

Recent Purchases

Restricted Purchases

Once created, you can assign a list to accounts, brands, websites, stores, or customers on their corresponding tabs.

Use the products tabs to add products to the list, and on a restricted list, the restrictions tab lets you define restrictions to prevent the item being sold. For example, Firearm dealers can't sell specific items to specific states; use this section to automate those restrictions.

Another example would be private labeling. If a manufacture has a customer that they private label products for; you could create a list so only that customers can access those items.

Use Price Lists to set up specific pricing that overrides the connected ERP's pricing If you're looking to set up a contract that overrides the ERP pricing, utilize the Price List to manage that. Contracts and restricted items lists sync from P21 if setup.

You may want to limit which products unregistered guests can see while browsing site. To do this you would set up a list of products and assign it to guests.

If there's a list that you want to keep accessible to customers, enable the box in Details labeled Quick Order Pad: Auto load for the quick order pad under Settings. A good list to enable this setting with is a customer's favorites lists.

Find additional settings for lists under Stores > Configuration > Epicor Configuration > Lists. Here you can manage list properties by scope, and control lists specifics, such as enabling customers to save their cartas a list.

To view Payment Methods, navigate to Epicor > Configuration > Sales> Payment Methods.

Several payment methods come pre-installed with ECC as part of the base Magento.

These include:

PayPal, Klarna, Amazon Pay, Check or Money Order, Cash on Delivery, Bank transfer, Zero Subtotal Checkout.

Kinetic uses the credit card gateways CRE and ESDM.

whereas P21 and Eclipse use Elements Payment Gateway.

Based on customer needs, review and enable or disable the corresponding payment options.

Each ERP has specific requirements for setup and which payment gateways comply with it. Review the Implementation Guide Payment Gateways section for specifics.

Lastly, the Epicor Payment Module allows customers to charge to their customer account in the connected ERP. You can configure limits to ECC orders based on their credit status.

Select the right arrow icon to continue.

Quick Order Pad

Quick Order Pad
Customers use the Quick Order Pad to quickly add multiple products to their cart with a streamlined search.

Once you assign Pre-defined lists to a customer, they can access and view those lists from the Quick Order Pad. This may even be used for favorites lists or products most frequently purchased.

To set a list to appear in the Quick Order Pad, you must enable the option Quick Order Pad: Auto load for the quick order pad. If set up to do so, they may even add items to their cart from a .CSV file.

To enable this, navigate to Epicor > Configuration > Sales > Checkout > Add to Cart from CSV. Then choose whether you want this accessible from My Account or from Quick Order Pad.

Select continue to move onto the Themes topic.

Themes

To review and modify themes, select Content > Themes.

Here you can see the existing themes, and if applicable to the ECC deployment; modify existing ones or create new ones. Note that Customers do not have access to create new themes.

Select a theme from the list to view its settings and make adjustments needed in the corresponding tabs.

For base installations you can manage the various parts of the site like the site menu, banner or footer from the various tabs. Modify the site colors and Contact Us details under the Manage Defaults tab.

Select the Continue button to go to the recap and complete the course.

Recap

Good work completing the ECC Configuration, Product Setup, and Themes course. You should now be able to

Explain configuration scopes and which elements can vary between stores, sites, and views.

Locate, understand and configure key system attributes.

Understand the basics of the Quick Order Pad

Know where to access Themes details.

About Epicor

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