ECC Implementation Overview

If you're involved in implementing Epicor Commerce Connect (ECC), you'll need more than just a foundation knowledge of the product. Also, you'll need to know how an ECC implementation typically proceeds, and what issues you may need to handle along the way.

At the end of this course, you'll be able to explain what ECC is, and how it leverages the award-winning Magento eCommerce platform to empower companies in the digital age. You'll be able to describe the basic flow of an ECC implementation, and explain key concepts essential to implementing the platform, such as:

Communication between ECC and the ERP system (sync, mapping & msg)

ECC Configuration – focusing on several key areas you are likely to encounter in a typical implementation.

Objectives

- ECC/Magento Overview
- Implementation Project Steps
- ECC and Different ERP Systems
- Key Areas of Implementations

ECC/Magento Overview

Magento is the most commonly-used open source eCommerce solution, which enables users to fully manage their website and inventory. If you need more information about Magento core-functionality, you can access the Magento User Guide here. * >

With the powerful foundation of Magento, Epicor Commerce Connect (ECC) incorporates additional features and functionalities that set it apart from base Magento.

First, ECC connects to an Epicor ERP solution, including Kinetic, P21, and Eclipse, which means that the data used by ECC comes directly from the business's ERP system. Just to name a few elements: products, customers, sales reps, pricing – these data come from the ERP system. In fact, the inventory management aspect of ECC mostly takes place in the ERP system, rather than in ECC.

This transfer of information is real-time – for example, when a customer is browsing the site, looking at products, ECC is communicating with the ERP system to get current pricing and stock information. So there are live calls being made between the systems, all of which means that the two systems communicate using both Upload and Request xml messages. *

As you'll see, messaging is an important topic. Now, different systems have different field names and values, so, in order for these upload and request messages to make sense to both systems, you also must understand the concept of mapping, whereby you associate a value in the ERP system with the corresponding value in ECC. For example, ECC might call a particular shipping method "UPS Ground", while the ERP system calls it carrier code "10003".

Another aspect of the communication between ECC and the ERP system is the Logs. These enable you to see what messages have passed between the two systems, and if they were successful. Any errors will show up here, with error code and description, which help you to troubleshoot problems that might occur during data sync.

Other non-Magento additions that make ECC unique include ECC Lists, which enables you to limit what products are visible to certain customers, and you can integrate with lists in the ERP system (especially with P21).

There's also Sales Reps, including hierarchies – which enables individual salespeople to handle particular customers, and individual reps can log in and masquerade as a customer in order to see exactly what their customers see.

Customer Connect is a B2B (Business to Business) solution, providing your clients' customers access to their own account information: quotes, orders, prices, shipments, invoices, payments, service calls, RMAs.

Dealer Portal enables clients to sell configured products via a dealer channel (this option is only available for Kinetic).

Supplier Portal enables suppliers to view requests for quotations, parts, supplier invoices, orders, new purchase orders, and payments.

Magento has its own database. Even if a client has more than one website, they'll need just the one database. Clients can upload Product images and product documentation to a repository folder in this database using FTP, a secure and safe way to transfer files digitally. This is to make them available for display in ECC. However, it is worth noting that with Kinetic, the transfer of product images to ECC is automated.

Implementation Project Steps

So how does an ECC implementation project typically proceed? Let's get an idea of the various stages in the process, and what's involved. ECC Advanced implementations – by far the longest and most complex ECC installations – are carried out together with our implementation partners. (If you're implementing ECC Base or ECC Express, this process will usually be simpler and shorter).

Early in the process, there will be a kick-off call with the customer, to gather information about the customer and their needs, and set the stage for the road ahead. You will use a kick-off deck presentation as part of this process. A standard version is available, which you can tailor to the client.

This covers a number of basic topics, such as target markets (B2B, B2C?), how many customers, order volumes, as well as project details, expected Go-live date and so on. At this stage, you'll also be covering the contract, and what it includes – e.g. Consulting Hours, ECC Support, timelines, environments, what is in scope, what is out of scope, and what your responsibilities will be, but also what responsibilities they will have.

You'll also need to be aware of the minimum software version of the ERP system in question, and if the customer will also need to upgrade their system to a later version. It's certainly advisable to avoid the minimum version, to ensure the customer will have access to all the ECC features.

The discovery call that follows aims to establish process-related details of the customer's requirement, and to find out details of the variables that will need to be addressed during the implementation. For example, there will be discussion of taxation setup, credit card processing, product types and attributes. Any requirements for third-party add-ons or plugins should also be established. Note that these 3rd party additions are only possible with ECC Advanced.

For ECC Advanced installations, the implementation partner now puts together a template for the design process, laying out the site design requirement, theme, logos, and so on, which, after any necessary changes and adjustments, is approved by the customer.

Epicor ECC consultants can also get started on the actual setup, connecting ECC with the ERP system in question, syncing data, and enabling base testing to begin – in a test environment.

Once the essential design is approved, the implementation partner can apply the detailed theme they have designed, leading to the release of version 1.0.

Now begins heavy testing of this version, still in a test environment, to ensure everything works as it should – exploring the customizations and going through various full customer and/or consumer order processes. There is a standard UAT template for this, which you can personalize for the customer, but the content is essentially standard. This document includes scope for the customer to provide feedback, and to sign off each section.

Once the customer signs off on the final version, it's time to copy the system over to a live environment and Go Live. Then follows a "normalization" period, after which the customer can be handed over to Support.

ECC and Different ERP Systems

We've already talked about direct communication between ECC and the ERP system. This is certainly true for Kinetic, as the API is integrated.

However, some systems also require install of middleware.

For example, with the Eclipse ERP system, ECC connects to an API server, which in turn connects to the ERP system. This middleware install should take place on the customer side, but the API could be installed by the Epicor SaaS Team if the customer is Epicor SaaS hosted.

The situation is similar with the P21 ERP system. However, it is worth noting that, if the customer already uses the P21 web UI, the middleware is already installed for that purpose, so it does not require a separate install for ECC use.

You perform much of the initial ECC setup for communication with the ERP system under the special Epicor menu in ECC. Above all, you'll find much of this setup under the Epicor > Quick Start

menu, which is where you set up the basic communications between the systems, and set various mapping values.

And on the ERP side, you need to take certain steps to make sure data such as customers and products are enabled for transfer to ECC, so that ECC can pick them up when you first sync the data, and anytime thereafter. This differs for each ERP system, so you'll need to know specific requirements according to the project you're involved in. These steps are covered in the ECC Installation and Upgrade Guide, which includes appendices on how to set up each ERP system for ECC.

After the initial configuration comes the important step of initiating the first data sync. This first sync involves syncing data such as Locations and Customers, but in general, data sync involves numerous messages, including Products, Categories, Category Mapping, Exchange Rates, Suppliers, etc.

Be aware that this sync works differently depending on which ERP system you are connecting to. With Epicor Kinetic, you actually initiate the data syncing in Kinetic, using the ECC Customer/Consumer Synchronization program, where you set up processes to push data from Kinetic to ECC. On the other hand, with P21 and Eclipse, you initiate the data sync from ECC, via the SYN request.

Key Areas of Implementations

When it comes to the ECC setup, there are several areas that require specific setup according to the customer's requirements. Here, we give an overview of the areas of note, so you know what awaits you.

Payment Methods

Some payment methods are already available in Magento and ECC. For example, you'll find the Elements/Worldpay payment gateway, which is used by P21 and Eclipse. You'll also find other third-party options, such as PayPal, Braintree, Klarna, Amazon Pay.

However, some clients may use another payment gateway, for example, Payment Tech or First Data, and these would therefore involve third-party extensions. Remember, these 3rd party add-ons are only possible with ECC Advanced.

EPX/CRE and ESDM are Epicor's own solutions for Kinetic credit card processing.

One reason why a B2B client may require a special payment method solution is to enable capture of payment details at checkout, but only take payment once the invoice is created in the system. This business scenario requires a third-party payment method. Note: the payment setup involves not only enabling and configuring the payment methods under the Sales configuration section, but also includes the need for mapping.

You can enter the payment method mappings in Quick Start, under Checkout Settings, or you can go to Epicor Mapping. Here you'll find all the mapping types, not just Payment. You'll also need to enter the Card Type mapping for credit cards.

Another common B2B scenario is for customers to make orders On Account, i.e. on credit. For this, ECC provides the Epicor Payment Method. This enables ECC to get payment terms from the ERP system, and to perform a credit check on the customer, to make sure they can place the order on account.

ECC includes several popular shipping methods, such as UPS, USPS, FedEx, and DHL. You can also rename the Free, Fixed, and Table Rates to suit particular requirements.

If the client needs to get shipping rates for LTL shipments, or provide rates based on product types, this requires a third-party extension.

For example, an option for ECC Advanced implementations is Shipper HQ shipping management software.

Remember also that you'll need to do the mapping for Shipping Methods – this is part of the Quickstart setup, but you'll also find it on the standard Mapping page in the back end.

The important thing to understand about tax in ECC is that the ERP system handles the taxation!

So, whether the ERP system just uses its native tax engine, or you have Kinetic with Avalara® integration, the tax is calculated in the ERP system and sent to ECC.

Pricing in ECC is essentially handled in the ERP system. ECC listens to the ERP for pricing messages.

However, there are exceptions.

For example, you can set up promotions in ECC, and set up the system to send the price and discount back to the ERP system, which uses a discount code to enter a Miscellaneous Charge. Whilst most customers don't make use of this possibility, it's worth being aware of this, as it means extra setup is required on the ERP side.

Product Categories enable you to group products. So, on the eCommerce website, a customer can access a categories menu and view products from a particular category they select.

In Kinetic, these divisions are called Product Groups. So, if they're already set up there, they can sync with ECC without trouble. But if the product groups do not yet exist in Kinetic, you have to create them there first.

Note that product group setup differs from system to system. For example, in P21, you can set up categories in Item Category Maintenance. And in Eclipse, you can achieve something similar in Web Drills. In these cases, the categories might not be set up in the ERP system yet, so that will also require setup during the implementation.

But even in Kinetic, the product groups may be set up more for GL purposes, rather than for eCommerce sub-divisions, so this also might require some modification.

It's important to be aware of the alternative, which is to manage the categories and their structure entirely within ECC/Magento. If you take this route, you'll need to disable the STG and SGP upload messages, which are responsible for uploading product category information from the ERP system to ECC.

Sales Reps are a powerful and useful feature of ECC. You can sync sales reps from the ERP system, along with their email address. More significantly, you can also bring over their associations with particular customers. One feature of this is that sales reps can then enter ECC with a customer mask, to see exactly what their particular customer sees in ECC in terms of pricing, etc.

Recap

In this course, we've provided an overview of the following:

Magento basics, and how ECC includes additional features built on top of base Magento.

We've looked at the steps involved in a typical implementation process.

We then learned that some ERP systems (P21 and Eclipse), in order to communicate with ECC, require a separate middleware / API server.

We talked about the basic Quick Start setup in ECC, the need to enable products and customers and other items in the ERP system for use in ECC, and the initial data sync to upload data from the ERP system to ECC.

We touched on the important area of upload and request xml messages, the need to map values between ECC and the ERP system, and the use of logs to check communication and troubleshoot errors.

And finally, we looked at several areas that require special attention in the planning and implementation of an ECC customer install.

About Epicor

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