Installing ECC Base

This course is about how to install ECC Base. In the previous courses in this series, you have learnt about what Epicor Commerce Connect is, and the important differences between each ECC offering – Express, Base, and Advanced.

This course specifically looks at ECC Base, with its B2C and B2B eCommerce characteristics. There is also another course that looks at the install of ECC Express, the simpler, more affordable solution.

So, let's now look at ECC Base.

Objectives

- Topic 1
- Topic 2
- Topic 3
- Topic 4

Login and Quick Start Settings

Login and General Settings

Before we look at the front end, we need to do some back-end setup. First of all, you need to log into ECC. The login page is for Magento, but as you can see, the URL is for epicorcommerce.com. The Admin login credentials are provided by the SaaS team.

Enter the username and password. When you log in, the first page you see is the Dashboard.

We're going to do a "quick start". So, navigate to Epicor > Quick Start.

Click on each option on the Quick Start menu to learn what to set up there.

General

The Quick Start > General tab is where you set up the ERP Settings. The background is red, because it's not set up yet.

First up, select the ERP System you're connecting to, for example Epicor ERP, Prophet 21, Eclipse, or Biztrack.

Depending on the ERP system you select, the Networking Settings will differ slightly. For example, if you're connecting to P21, you'll also require a Token URL.

Enter the Site Name, ERP URL, Username and Password, and make sure you specify the Default company. All this information comes from the ERP system.

Hit Save. Now the background turns green. Click Test Network Connection. If the credentials you've set are correct, you'll see the message Successful Connection.

In the Licensing Settings section, for Epicor ERP you can click Request License from ERP, so the system automatically retrieves the license file. However, for other systems, such as P21, you have to click Choose File, then locate the license file to upload it.

Hit Save. The Licensing Settings section also turns green. ECC can be licensed in several ways.ECC can be licensed in several ways:

-ECC Consumer (Consumer Connect) - traditional B2C site

-ECC Customer (Customer Connect) - traditional B2B, along with access to orders, prices, invoices,

payments, service calls and RMAs

-Dealer - site that provides ability to sell configured products through a dealer channel

-Distributor - site that enables you to sell configured products through a distributor channel

-ECC Supplier (Supplier Connect) - site that allows suppliers to see requests for quotations, parts, prices, orders, new purchase orders and payments.

CUSTOMER SETTINGS

Now select the Customer Settings tab.

Here you need to set the Default ERP Code, which you get from the customer. The ERP Code defines the default web prices displayed on the website.

For a Consumer site, the default ERP account code is used to record all website transactions performed by consumers. This account has a defined credit limit. For a Customer site, this account is only used to display default prices when the customers are not logged in. To see actual prices and place orders, the customers must log in to the site using their ECC credentials.

For a mixed Consumer/Customer environment, the default ERP account is used for consumers' web transactions.

If you don't yet know what the Default ERP Code or Account is, you can leave it blank at first, then come back to search for it and select it once you've uploaded the accounts from the ERP system.

Set the Default Country for addresses.

Add the Customer Tax Classes – there can be multiple entries here, and you'll select one of them as the Default Tax Code, which is used for transactions when a specific tax code is not assigned to a customer in your ERP system.

A Customer Tax Class is automatically created whenever a CUS message is uploaded with an unknown tax code.

For the Use Multiple Customer Groups setting, select either Yes or No.

Yes means that when a CUS message is uploaded, ECC creates a Customer Group with the same name as the tax code in the CUS message (if a group of that name does not already exist) and assigns it to the Tax class of the same name. So, for each different Customer Tax Class there is a corresponding Customer Group.

Assuming that the correct tax rules are defined in ECC, this means that ECC calculates the tax that is applicable on a shopper's cart when it sends the BSV request - based on the Customer Group/Customer Tax Class.

No means that ECC prompts for a Default Customer Group, and when processing all CUS messages, assigns the customer to that default group, regardless of the <taxCode> in the CUS message.

This means all customers are put in the same Customer Group. Therefore, ECC cannot calculate the tax applicable on a shopper's cart when it sends the BSV request – instead, ECC relies on the ERP system to send back the response with the correct tax calculations.

In the Country Mapping section, you match each country code from the ERP system to the Magento Country.

Likewise, enter all the Currency codes from the ERP system, then select the corresponding Magento Country (Currency).

Hit Save.

PRODUCTS/CONFIGURATOR SETTINGS

Now select the Products/Configurator Settings tab.

The optional UOM Filter field enables you to define the UOMs you do not want to sell across the site for all products. It is recommended to configure UOM filter in your ERP system, for example, using the product UOM settings.

Enter the Product Tax Classes to use in ECC – these must match the product classes the ERP system.

In the Default Tax Code drop-down list, select a tax to use for transactions if a specific tax code is not assigned to the product in your ERP system.

The Language Mapping automatically populates for E10, but if you' re installing for a P21 system, click Add to add a new ERP code for the language. His code must be the same as you use in your ERP system. From the drop-down to the right, select a referring language. Add as many languages as you use in your system.

If the customer will use Epicor Web Access Configurator, make sure you enter the customer's EWA Username, Password, and URL in the Configurator Settings section.

Likewise, if the customer uses Epicor Web Configurator (EWC), enter their EWC Username, Password, URL, and App Server URL in the EWC Settings section.

Once you've done this, hit Save.

CHECKOUT SETTINGS

Next, go to the Checkout Settings tab. Here you need to specify the prefixes for ERP Order, Quote, Return, and AR Payment References.

In the Shipping Method Mapping section, enter the shipping method codes from the ERP system, and select the corresponding Magento Shipping Method from the drop-down list.

For the Order Status Mapping, click the Add button to add new Order Status Codes. This code must be the same as you use in your ERP system. From the drop-downs to the right, select a referring Order Status and Order State. Add as many order statuses as you use in your ERP system.

In the Payment Mapping section, click the Add button to add a new Payment Method and enter a referring ERP Code. Select a Payment Collect and an Order Trigger you want to use for this method. For example, Epicor ERP submits Token Only.

The following order triggers are available:

Paid - Order processing starts when the customer payment is received.

Authorized - Order processing starts when the payment amount is authorized on the customer's credit card.

Paid or Authorized - Order processing starts either when the payment is received or when the payment amount is authorized on the customer's credit card.

Any - Order processing starts when the order is posted.

Remember to hit Save.

B2B SETTINGS

Enter four Status Mappings – the codes you enter here must match the ERP system. As always, click Save.

Syncing Data

Now let's look at how to sync data from the ERP system to ECC. This involves sending a SYN request from ECC to the ERP system. Navigate to Epicor > Send SYN Request.

Now you select store you want to sync, and what Upload Messages to include. The messages available here depend on what licenses the customer has. For example, if you are connecting to E10, and the customer has a Supplier Connect license, you'll see Suppliers here. But with P21, for example, you won't see this.

You can also click Advanced for a greater number of options and more detail.

Select the language (English), and then you need to set the Sync Type.

As you're setting up the system for the first time, select Full Sync – No From Date.

Now click Send SYN. Make sure you get the message SYN request successfully sent.

You can use the messaging log to check the status of the SYN request.

Navigate to Epicor > Log

The SYN – Erp Synchronisation task shows status Success, and the Type column shows all the message types that were sent. If you hit Reset Filter, you can see new messages in the log, with newer task IDs, that correspond to the data being sent – for example, CUS – Customer Account Upload, or CAD – Customer Address Upload, and so on.

Now we can take a look at the data that's uploaded. Go to Epicor > ERP Accounts. The grid displays all the accounts that have now been created, including identifiers such as Customer Name, Customer Group, and so on.

It takes a little while for all the records to upload, so if you don't see anything at first, just wait a little while and keep checking back.

Go to Customers > All Customers to view the customer and sales rep records that have uploaded.

Likewise, navigate to Catalog > Products, and you can view all the products that have been uploaded.

Store Information

When you browse an online store or portal, you'll usually see the company details somewhere on the site. That's what we'll do now. Navigate to Epicor > Configuration.

On the General tab, select General. Here you'll find the Store Information section.

You can enter the Store Name the customer requires, enter the address and contact details, and the hours of operation.

Hit Save.

Edit Theme

The theme determines how the site will look when customers access it. For example, the color scheme is a significant component of any theme. The aim is to set baseline styling to suit your customer's brand guidelines, logo, and colors.

Navigate to Content > Configuration. In the Design Configuration screen, you can see the Main Website Store is currently not linked to a theme. [No Theme]

So, let's work on various aspects of the theme.

General

From the menu, go to Content > Themes. In the Themes window, you can see one of the themes is the ECC Base Theme – Green and Black.

Note, you won't see this theme in ECC Express, which has the Magento Luma theme, which you can't customize at all. But we can customize the ECC Base Theme to some extent, which is what we'll do next.

Click View. In the Theme > General tab, you can actually click on the Theme Preview Image to see how this theme looks.

Manage Defaults

Close the preview and go to Theme > Manage Defaults.

The Color Picker has settings for Primary, Secondary, and Tertiary Color.

In the Contact Us section, select Enable Contact Us? then enter the details that you want to display on the front end. At the least, you have to enter a Title. But it makes sense also to add the various contact details. For the address, use the code </br> to add line breaks.

Click Save Contact Us.

Menu

By menu, we mean the menu that customers will see on the web page, with links to other pages, for example Home Page, Services, Contact Details, and so on.

So, go to Theme > Manage Menu. This displays the front-end configuration. What menu items will display? ECC contains a number of default offerings, but you can change the Menu Item Name for each item if need be, and you can set the display mode for the menu item. Let's look at some of those display modes.

CMS Page – in the Add CMS Page, select the page you want this menu item to link to. The page to link to must already exist – you can see the created pages in Content > Pages. For example, here's the Solutions page.

Category Listing – The menu item has a drop-down arrow, so when you hover over this menu item, the underlying category links all display, and you can click them.

URL Path – Use this to enter the path to a location on your website. So, you don't enter the full URL, but the relative path, i.e. the part of the URL that goes after the domain name.

When you've made any required changes to a menu item, click Save Menu.

Banner

The optional banner feature enables you to display certain images on the site, perhaps to illustrate some keywords or ideas about the company or its products.

Each banner image MUST be 1225 * 450 pixels, otherwise you'll get an error.

Select the Enable Banner Feature check box, then click the link to select an image, or you can drag and drop. Once you've uploaded an image, you can click directly on that image to access further options for it. For example, you can add a title for the image, apply a URL link to it, any content to display on the front end, and the image's position relative to other images (enter a number).

When you're done, click Save Banner.

Featured Products & Bestsellers

In the Manage Featured Products section, you can display certain items prominently on the front end First, select the Enable Featured Product Feature check box, and enter a suitable Title. For example, New Arrivals; Latest Offers; etc.

You can set how many columns and rows of featured products will display on the page.

In the grid, you specify the items you want to include in the featured items. There are a few ways to select the items.

For example, in the first column, if you select Any from the drop-down, then enter search text in the SKU field, the system will display any items that contain that text. You can then select items individually, or select all using this check box at the top.

When you're done selecting items to include, click Save Featured.

Manage Bestseller Products works in the same way, and enables you to display another, separate group of products. Enable Bestseller Products, enter a Title, set the number of columns and rows, select the items to include, then click Save Bestseller.

Footers

You can add a maximum of five footer links to the footer section of the front end (home page).

First, select the Enable Footer Link check box, and enter a Footer Link Name. The Display Mode is gray, because this is the title of the footer links.

Now click Add Footer Link to create a new link. Enter the Footer Link Name, and select the Display Mode from the drop-down. This time, there are three choices:

CMS Page; Category Page; URL Path.

When you're done, click Save Footer Link.

Social Media

Promote the website via social media – you can add links to various different social media platforms.

Make sure the Enable Social Media check box is selected. To start with, you can enter a suitable Header Name, such as "Follow Us". Then click Add Social Media Link. In the Handler Type drop-down, you can select from five well-known social media platforms. Enter the URL Path and click Save Social Media Link. If you select Others as the Handler Type, additional fields enable, so you can enter the name of the Social Media platform, and upload an image for the platform

Apply Theme and Refresh Cache

Now we'll actually apply the theme.

Navigate to Content > Configuration. For the Main Website Store, click Edit. The Default Store View window opens. Select the Default Theme to apply (ECC Base Theme - Green and Black). Click Save Configuration.

Notice the warning message about invalidated Cache Types. Click on the Cache Management link in the message.

In Cache Management, choose Select All from the drop-down, and click Submit.

Set Up Customer Access Rights

In order for customers to access the store, they'll need login rights. They'll receive an access email. But let's give a customer access now, so we can log into the account and have a look round.

Navigate to Customers. You can scroll through the customer records, or enter search text at the top of any column.

For example, we know the name of the customer/user we want to grant access to, so we can type in the Name field, or perhaps the Email field. Click Search.

Select the check box for the user(s). In the Actions field, select Reset Password – Set Value, then specify a password in the New Password field. If you set Send Email to Yes, the user(s) will also receive an email to notify them of their access and password. Click Submit.

User Login to Front End

Now if we go to the store front end, the user can login with their username and new password.

Once the customer signs in, depending on the website settings, they may see the Home page, or the My Account details page. They can see the site with its current theme – the color scheme, company logo, and so on.

Scroll down to view the Links and the Contact Us sections you set up during the configuration. You can also see the social media links you entered.

Now if you click Home, you'll go to the home page, with the Banners, Featured Products, Bestsellers, all of which you set up during the configuration.

The menu along the top corresponds to the menu details you set in the Manage Menu section – see how the Category Listing display mode displays a drop-down where you can access any of the underlying categories.

Edit Colors & Company Logo

The default green and black color scheme isn't right, so let's fix that too.

Back in the Content > Theme section, select to View the theme, then navigate to Manage Defaults.

You can click in the field for the Primary, Secondary, and Tertiary colors, and specify the correct color, for example by RGB code. When you've done that, click Save & Deploy Color Picker. Note the changes "may take some time".

To see the color changes on the home page, just click Refresh.

Not happy with the current look of the company name? Navigate to Content > Configuration. For the ECC Black and Green theme, click Edit. Under Default Store View, navigate to the Header section. Here you can upload an image file for the company logo.

Recap

This concludes the ECC Base install course. ECC Base is a great B2B and B2C eCommerce product, which offers some degree of scope for tailoring a solution to a customer's needs. However, for a full-customizable, tailored customer solution, ECC Advanced is the answer.

For a more in-depth look at the implementation and administration of ECC, we recommend you also opt for the additional ECC Administrator certification.

Thanks for watching!

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.

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