Installing ECC Express

This course looks at the setup of ECC Express. 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.
Remember, ECC Express is a more basic online customer self-service portal, designed for quick implementation and affordability. In these unprecedented times, Express also ensures a fast turnaround between order and Go Live.
There is also a separate course that deals specifically with the installation of ECC Base.
So, let's look at ECC Express.

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.

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 (e10), Prophet 21 (p21), 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.

Customer Settings

The customer settings you enter here come from the customer's ERP system.

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

Add the Customer Tax Classes – there can be multiple entries here, and you'll select one of them as the Default Tax Code.

Use Multiple Customer Groups depends on whether the customer has customer groups set up in their ERP system; the default setting here is Yes.

For the Country Mapping and Currency Mapping, you need to map the codes found in the ERP system with the equivalent code here in ECC (Magento Country). So, in the ERP system the country code might be USA, and the corresponding value in ECC (Magento) is United States. Likewise, the currency code might be USD, while in ECC (Magento) it's US Dollar.

Hit Save.

Product/Configurator Settings

Next, select the Product/Configurator Settings tab.

This is where you enter the UOM Filter, and the Product Tax Classes.

You have to select a Default Tax Code here as well.

The language mapping automatically populates for E10, but if you're installing for a P21 system, for example in the USA, click Add to create a new mapping, enter 1 as the code, and select English (United States).

You don't need to address the Configurator Settings or EWC Settings, as they are not part of this Express install.

Remember to hit Save.

Checkout Settings and B2B Settings

Now go to Checkout Settings. This section contains the reference prefixes. You don't need to set the Shipping Method Mapping, as the checkout process is not part of ECC Express. The same applies for Order Status Mapping and Payment Mapping.

Hit Save.

The B2B Settings tab is the last section on the Quick Start panel, and contains various mappings for Customer/Supplier Grid and Search Settings, but you don't have to do anything here, so we can move straight onto the next step – setting up the store information.

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.

Next we'll look at the theme.

Site and Email Logos

If you look at the front end for this setup now, there's no logo on the site – not even the logon screen. Of course, we want to change this to suit the particular customer.

So, let's change the logo. Go to Content > Configuration. The Design Configuration window displays. For the Main Website Store / Default Store View row, select Edit. This takes you to the Default Store View. There are several sections here.

Select the Header section. Here, browse to find the image, or drag and drop it here.

When a customer signs up with an eCommerce site, it's quite normal that they receive emails regarding any transactions they enter on the site. You can also set the logo for those emails.

Navigate to the Transactional Emails section. Again, you can browse to find it, or drag and drop it here.

Click Save Configuration.

Now if you look at the front end, you'll see the new logo you applied.

Data Sync, Cache, Logs

OK, so we've set up the shell for the site, but don't have any data in there yet.

So now let's look at how to sync data from the ERP system to ECC. This involves sending an SYN (sync) request from ECC to the ERP system.

Before you do this, you need to check a couple of settings. Navigate to Epicor > Configuration, and select the Upload Messages tab.

In the SGP Link Product to Category Upload section, make sure The SGP Links Products to Categories is NOT enabled.

Likewise, for the STG Product Group Upload section, make sure The STG is Used to Upload Product Categories is also NOT enabled.

These relate to the catalog functionality, which is not part of ECC Express.

Click Save Config.

Sometimes, the data that you set or change won't be considered by the system yet. So, the cache is invalidated. So, to ensure the data selected or modified appears correctly, we refresh the cache.

You can click the message that displays, or go to System > Cache Management. You can see the items that need a refresh. So you can select those, or select everything, make sure you have Refresh as the action, and click Submit.

Now we're ready to send the sync request. 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.

View Synced Data

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.

Access Credentials

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. 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

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'll either first see the Home page, or the My Account details page.

On the left there are various links to different views, such as the Dashboard, and information about orders, invoices, and so on.

Conclusion

This concludes the ECC Express setup. Express is designed to be quick to implement, which is especially ideal during these unprecedented times, when customers need to be up and running with alternative solutions as quickly as possible.

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