# Introduction to Epicor Commerce Connect

Today’s growing marketplace requires a digital strategy, and we’re here to help your business’s Ecommerce platform thrive with a customizable website and business analytics to drive your decisions.

The learning path beginning with this course will help you use Epicor Commerce to your full potential. Throughout the rest of these courses, we will demonstrate best practices to set up your website and stores, control data between your ERP and Epicor Commerce, manage access to products and functionality, and promote and sell your products.

In this introductory course, we will take a high-level view of the state of Ecommerce.

Next, we’ll imagine the possibilities for your Epicor Commerce platform through a Site Overview and then retrieve essential data in “My Profile” and “Account Details.”

Finally, we’ll follow a customer’s transaction to help you envision how your customers can make fast, easy, repeated purchases through your website.

Choose a topic to continue.

Objectives

* eCommerce, A Business Necessity
* Site Overview
* My Profile and Account Details
* Customer Example

eCommerce, A Business Necessity

Customers and employees have become so comfortable with the digital buying experience that many expect businesses to adapt with an online marketplace where researching is fast and buying is easy and repeatable.

Before exploring how Epicor Commerce can adjust to your needs and then inform your decisions, first consider these questions:

How do your buyers purchase?

What are their touch points?

What are the buyers’ expectations and how do you meet them?

The diverse feature sets of Epicor Commerce can put your answers into practice.

Epicor Commerce is complete, connected, and customer proven.

It can help you rapidly grow sales with a modern and innovative digital commerce solution that helps attract online buyers and develop them into accounts.

It’s tightly integrated with your Epicor ERP and updates information like stock, pricing, and orders in real time. It provides a tightly aligned B2B feature set to help you automate transactions and enable self-service.

It is built on the Magento platform to give you the tools and insight to evolve with the market and buyer behavior.

Because digital eCommerce needs vary, Epicor Commerce provides the latest innovations in digital commerce including:

Sales rep features, user defined fields, master shoppers, product groups, integration with configurators, B2B self-service, price lists, …And much more.

Tap the arrow to continue.

Site Overview

Upon logging in, the dashboard provides analytics at a glance. Filter through website and store views to see sales, search terms, and product and customer data.

The side menu houses all site navigation. You’ll start many of your configurations here.

Although we’ll cover most of these tabs later, notice the tab labeled Epicor. If Epicor comes out with a new or improved feature, you’ll find it here. We constantly update and refine these homegrown functionalities to integrate with your Epicor ERP. Take special note of the Configuration button. Although some of this has already been set up by the implementation team, here’s where you’ll enable and tweak features for your needs.

Select Configuration.

We’ll refer to this screen as the “Configuration Menu.” Note that most data should be updated in your ERP system, not in Epicor Commerce. We’ll spend our time in "Epicor Configuration” with best practices to configure your site with your ERP system and sell your products. The tabs below Epicor Configuration, are Magento configurations. We encourage you to learn more about the Magento platform’s configurations by searching online for the “Adobe Commerce Getting Started Guide.”

Now, let’s think about your customers.

One of two types of people will visit your site - browsers or buyers. The browser is interested in researching to determine if they will buy. This person is making judgements as to whether your brand is trustworthy, and whether your product is what they need. The browser needs information at their fingertips to make a fast, educated decision.

On the other hand, the buyer has created an account and intends to make a purchase with ease and speed. The buyer needs an experience that is simple, customizable, and repeatable.

Features in Epicor Commerce will serve both personas.

Throughout these courses, we will periodically step into the shoes of Jim, a site admin for a hardware distributor, to learn how to manage Epicor Commerce in the same way that you will learn to implement your site.

Let’s fast forward to Jim’s functional site to demonstrate the experience of a customer from browsing to buying.

The browser is greeted with the customizable banner showcasing Jim’s newest product. As the banner slides, the browser sees sales and training events, monthly flyers, and a recent, prestigious award. Jim’s company’s logo and colors create a seamless brand.

The browser begins scrolling to find blocks filled with categories of products. Featured product widgets highlight top sellers or products on sale with high-quality images.

Below are news articles, and blog posts.

Curious about the company, the browser visits the company’s social media pages.

The browser is beginning to build trust through Jim’s brand consistency, written and visual content, and social media, and begins analyzing Jim’s product. Content in the title bar puts information front and center with categorized products in a mega menu. It can also include pages like blogs, “About Us,” or Frequently Asked Questions.

A search bar prepopulated with popular searches expedites research using category terms.

Options at the top of the page include an opportunity to create an account and view the shopping cart.

The browser selects a product and uses the filters and subcategories with attributes like color, size, or other attributes to further refine the search.

Comparison flags speed up the research process by adding the product for quick comparison.

Wishlist flags save items to a list for later.

Listed under each product is the name, SKU, price, and updated stock information.

Selecting a product shows short and long descriptions.

The “More Information” tab includes specific attribute data like PSI rating, color, or size.

Customer reviews tell the browser that a product is trustworthy.

This browser is now ready to buy.

Tap the arrow to continue.

My Profile and Account Details

The browser, now buyer, saw how Epicor Commerce had an intuitive browsing and researching process and is ready to create an account and begin purchasing.

Upon logging in, the “My Profile” view is the central hub for the buyer’s account.

The account summary includes company information and the budget for this month.

The buyer can view the status of a recent order, check order approvals, and manage approval groups to require approval for employee orders that are expensive or over budget.

The buyer can manage lists, favorites, address book, product subscriptions, and contacts.

Next, the account details tab, for B2B users, helps the buyer manage contacts, shipping addresses, and account and financial information - set to automatically update from the ERP.

The buyer may accept, deny, or create a new quote, find past orders, invoices, pack slips, and tracking numbers generated in the ERP system, or allow business accounts to make individual payments on open invoices.

With the initial set up complete, the buyer can link their product SKU with Jim’s unique SKU for a matching item and use the familiar SKU to quickly find the item they need.

Tap the arrow to continue.

Customer Example

After creating an account, the buyer browses for products through the mega menu, categories, and product widgets on the main page. Since one product will be a reoccurring purchase, the buyer creates a quarterly subscription.

The buyer uses the quick order pad to auto load a favorite list and types in the company’s SKU and quantity to add multiple items to the cart.

During checkout, the buyer can apply discount codes or can convert the cart to a quote.

Buyers who are B2B can pay using Payment on Account or through credit card with prefilled shipping & billing address information.

Buyers who are B2C can pay using a credit card.

Once checkout is complete, a confirmation and receipt of purchase is emailed, and the purchase is complete.

Tap the arrow to continue.

Recap

In this introductory course, you learned about the functions of Epicor Commerce through the journey of a typical buyer.  We’ve seen some of the possibilities for using the site as a browser, buyer, and administrator.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2021 Epicor Software Corporation. All rights reserved.