# Setup

In this course, we will begin to follow Jim, the Epicor Commerce site admin for a hardware distributor. We’ll come alongside Jim to set up the scope, configurations, and CMS pages and then design pages, layout, and themes for his website.

Choose a topic to continue.

Objectives

* Setup
* Design

Setup

Epicor Commerce is built in a hierarchy of information – Global settings, websites, stores, and views.

Global includes all system-wide settings. Websites host configurations. Stores control root category configurations. Store views translate information like currency types and language.

A website can contain multiple stores and each store can contain multiple store views.

Each store has a unique main menu, but stores share products, admin, and checkout functionality. Stores can differ in their access to products or design.

The store view is customer-facing – allowing site administrators to customize the currencies, products, or language customers see.

Why start here? When doing any configuration, it’s crucial that you indicate the correct store or store view. Let’s see how this all applies to Jim.

Jim’s global settings are chosen with the implementation team.

At the website level, Jim enters information like country, currency, delivery methods, and payment methods.

His stores - within each site - include the store name and address, telephone number and email address that appear on emails or invoices sent to Jim’s customers.

Jim has multiple store views that share the same data and customer information but have different currencies and languages. Jim noticed that he forgot to apply the correct currency to the correct store view during configuration.

This information can be managed through the configuration menu under General > Currency Setup.

He makes the change so his customers can see the website in their native currency.

When completed, the portions of the general tab will include information that assists in billing, shipping, or tax rates.

Since Jim has store views set up for different regions of the world, he will need to configure each one separately.

For each of these stores, you can create several email addresses to funnel questions for things like General Contact, Sales Representatives, or Customer Support.

Although some configuration of your store has been completed by the implementation team, more details on this can be found on the Magento commerce user guide under “Basic Setup and Configuration.”

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

When a customer logs into a store view, you can customize the information that is available to them through their account.

For instance, you can disable the price display and cart for guest users to encourage customers to create accounts. This can be done from the Configuration menu at Customers > Customer Configuration.

Or you can change your customer’s experience in Epicor Configuration > Customer Connect through enabling “Invoice Payments” with the CAAP and CAPS messages or disabling “Account RFQs” with the CRQS and CRQU messages.

CMS or "content management system" allows for static data pages like “About us,” “contact info,” or “blog” articles.

Navigate to Content > Pages. Select “Add new page.” Choose a title, page type, and page image. The content heading will appear at the top of your page. Select “Edit with Page Builder” to add texts, buttons, videos, images, maps and much more. We’ll get back to this in a bit.

Expand “search engine optimization.” Either accept the default or enter a custom URL Key with lowercase letters and hyphens instead of spaces.

Meta title, keywords, and descriptions are often a part of how search engines direct customers to a website. Titles should be fewer than 70 characters and descriptions should be around 150 characters. Separate meta keywords with a comma.

Under “Page in Websites,” determine where the page will appear. Hold “control” while clicking to select multiple options.

To help users find your CMS page, you can turn on CMS page suggestions in the search bar. Navigate to Epicor > Configuration. As with any configuration, begin by setting the “scope” to the correct store view. Navigate to Catalog > Catalog. Expand Catalog search and ensure CMS Pages is set to “yes.”

Tap the arrow to continue.

Design

Now that you can add some content to your page, let’s focus on the design.

For CMS pages, you get to decide how the content is displayed for desktop and mobile. In the “content” dropdown, select “edit with page builder.” Although the page builder is intuitive, we will see Jim create a “Customer Testimonies” CMS page and highlight some important features.

The left panel includes methods of organization (layout) and types of content (elements and media).

Jim drags and drops a column. Content can now be added to this blank canvas. Column width is divided into 12 sections that can be adjusted by clicking and dragging the border between empty columns. Additional columns can be added by dragging and dropping and removed by hovering and selecting the delete icon.

For this page, Jim wants to add text and a video from a satisfied customer. He drags and drops “text” and “video.” Hovering over content and selecting the “edit” icon opens a menu to link content and adjust alignment.

To add a “Customer Testimonies” header, Jim selects a new “row” but accidentally places it at the bottom. To move the header to the top of the screen, Jim hovers over the layout, selects the move icon, and drags and drops the row at the top of the page. Finally, he adds a “Heading” to the row, types the page’s title, and chooses to center the text. Although it may not apply to this page, blocks and content can be added through the “add content” dropdown.

All of Jim’s designs will be automatically optimized for a mobile device – which can be viewed by selecting the mobile icon. Since this format will be used for several other store views available to countries speaking different languages, Jim selects “Save as Template” so he can later match the customer testimony to the geographical region and language of the store view.

When completed, select the “minimize” icon, scroll down to “Custom Design Update” and, if necessary, adjust the theme in the “new Theme” dropdown. There are three Epicor Commerce base themes to choose from in addition to two Magento themes. Select “Save.”

To learn more about page design in Epicor Commerce, watch the “Page Builder” course on the Help Center.

To ensure a cohesive brand, you can insert your company’s logo on the site and adjust the base theme colors.

Base theme colors can be adjusted at Content > Themes. Select “configuration” to update your logo. Select “Edit” for the store view you want to configure, expand the “header” section, and upload your logo.

Then, adjust the “welcome text” that will appear in the header for your store. Under “Other settings” expand the “HTML Head” section and upload an image to serve as a favicon for your website.

If you want to show that your store is under construction, display the “demo store notice” so customers know that no orders will be fulfilled until you are ready and have disabled the notice.

Finally, expand the “footer” section to change the copyright notice.

Save the configuration.

Tap the arrow to continue.

Recap

In this course we set up the scope, configurations, and CMS pages and then designed pages, layout, and themes.

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.