# Access

In this course, we will follow the site admin, Jim, and enable *access to* *products* through lists and *access to* *functionality* through access control, budget management, order approval, and maintenance.

Choose a topic to continue.

Objectives

* Lists
* Access Control
* Budget Management & Order Approval
* Maintenance

Lists

Like physical shopping lists, Epicor Commerce lists save time by compiling frequently ordered products. Repeat customers making similar orders can save their cart as a list. Customers can build product lists as they shop or use an existing list to start a new order.

You can encourage customers to create their own lists and to use lists that you predefined and assigned to them.

Lists can be enabled in the configuration menu under Epicor Configuration > Lists.

At the top of the screen, change the scope to your desired store. There are three list types and three shopping cart lists that can be enabled.

Favorite lists are used for frequently ordered products and recurring purchases. Unlike a Wishlist which removes items from the list once added to the cart, favorite lists remain intact to reuse.

Predefined lists allow Master Shoppers to assign lists to their customers – potentially limiting the products they can purchase.

Product Groups are lists of products from the same class that come from the ERP.

For shopping cart lists:

“Quick Save” creates a new, active list.

“Advanced Save” displays the “Add New List” page where shoppers can create custom lists.

And “Existing List” allows shoppers to add their cart to an existing list.

Control-click to select multiple options and select “Save Config.”

After enabling lists, Jim wants to streamline a common purchase by creating a custom list and assigning it to a customer.

Navigate to Epicor > Lists. You can upload a list with a CSV file or select “Add New List” to create one manually.

Choose a name and type.

Note that product group lists can restrict the products available for viewing and purchasing without modifying their properties in your ERP by assigning to the Site, ERP Account, or customer. These lists may be helpful for private label contracts to display products to a specific customer or ERP account while hiding them for others.

Restricted lists are based on geography and are helpful to hide products that can’t be sold in specific regions.

We will choose product group list.

Enter a unique code to identify the list, provide a note to explain the list’s purpose, define how long the list will be active, and choose other settings. Select “Save.”

You can assign lists to separate groups: B2C, B2B, or a chosen ERP. Filter for the list you just created and select edit. From the side menu, select “ERP Accounts.”

Set “ERP Account Link Type” to “Chosen ERP” and view all ERP accounts by selecting “Reset Filter.”

To associate the list with all accounts in the selected group, select the “exclude selected ERP Accounts?” check box. If you do this, the system assigns the list to all newly created ERP accounts added to the selected group.

If you do not “exclude selected ERP accounts,” you must assign each list manually to one account.

Similarly, lists can be assigned to customers by selecting “customers” in the left panel.

Products can also be uploaded to lists from CSV files. Just download an example csv file and use the template to create your own list.

It's possible to add products to lists manually; however, items can be added automatically if linked with conditions. For instance, when a new product is added that is categorized as "hardware" it can be automatically added to the “hardware” list.

You can also exclude selected products and include a position value to control the displayed item order. This can be done automatically by enabling "auto number."

Select save.

Tap the arrow to continue.

Access Control

Customer access is controlled through defining roles and associating them with customer types such as B2C, B2B, Dealers, Distributors, Suppliers, or ERP accounts. Like lists, Jim can assign these roles on a website, ERP account, and customer level to change which features are available to which customer.

In this case, Jim would like to create an “account administrator” role that can update account information and manage contacts but can’t delete this information.

Define these features and assign them to ERP accounts and customers through Epicor > Access Control- Roles and select “Add New Role.”

Enter a title and description. Enable the role by selecting the “Is Active” box and give a high priority of 10 so this role takes precedence over others.

Select the "Access Rights" panel to define the features available to this user. Assign access in bulk by choosing the “full access, “read only,” and “no access” buttons. Expanding each menu allows for more specific access control. This is where Jim would grant full access and then disable the ability to delete information through selecting the appropriate checkboxes.

In the side menu, use the "ERP Accounts” or “Customers” tab to define and assign the roles. You can assign roles through a CSV by selecting "Download Example CSV File,” updating the file, and then importing it.

To manually assign roles, select "reset filter" and check the boxes for the ERP accounts or customers you want associated with the access role.

Select “Save.”

Tap the arrow to continue.

Budget Management and Order Approval

One of Jim’s customers, a hardware shop owner, would like for his employees to make purchases from Epicor Commerce, but is on a strict budget. To accommodate this person and set spending thresholds, Jim needs to enable Budget Management and display the pertinent budget information to the employees.

From Epicor Configuration, select “Order Approval and Budgets.” Set “Enable Order Approval” to “Yes.”

To control the visible budget details on customer’s “My Account” page, navigate to Epicor Configuration > Customer Connect. Expand the “Customer Account Summary Block.” Scroll down to the budget options and enable fields you would like to be available to the customer by setting to “yes.”

“Save Config.”

Navigate to Epicor > Approval Groups.

Approval groups will help you set spending limits for child and parent customers as well as the combined spending for all customers in an ERP account. You’ll need to create at least two groups – child groups have lower spending limits. Parent groups have higher limits and can be set to approve child group over-budget purchases.

Add a new group or select an existing group.

Enter the approval group name and set to active. Then, link the group to an ERP account or customer.

Rules limit the spending for a single order while budget information limits spending over a period of time.

You can control what happens to the order that goes over the allotted budget in the budget action dropdown. If suspended, the person who is the parent of the shopper will need to approve the purchase before it goes through. This parent group can be created through the “Hierarchy” tab.

Budgets you define for an ERP account apply to all its customers unless the customers have their own budgets set up. Let’s set up ERP account budget management. This function is exclusively for B2B accounts.

Navigate to Epicor > ERP Accounts.

Select an account to add a budget.

On the bottom of the ERP Account Menu, select “Budget Information.” Enable by selecting “Is Active” and then “Add Budget.” Choose the budget type, start date, duration, and amount. This allows you to control the amount of money spent by all customers in the ERP account before approval is required.

Master Shoppers can use your site to set the budget for their employees in the same way. Additionally, they can specify what happens if an order goes over budget by selecting “Do not allow checkout if over budget.” Select “save budget” then select “Save.”

Tap the arrow to continue.

Maintenance

Using and refreshing caches can optimize the speed of your site.

It is best practice to refresh the message cache and access rights cache every 24 hours.

If a notification that caches are invalidated displays, navigate to System > Cache Management.

Verify that the following Magento Core caches are enabled:

Configuration, layouts, blocks html output, collections data, EAV types and attributes, web services configuration and translations.

If any are invalidated, check the appropriate boxes and use the "refresh" action to clean all caches.

Notifications will occur when there is a connectivity issue with the ERP that requires your attention. You can view the notifications in System > Notifications that will include the severity, date added, message details, and actions you can perform regarding the issue.

Tap the arrow to continue.

Recap

In this course, we have created and assigned lists, defined access control, assigned budgets to customers, and optimized our site through refreshing caches.

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