# Marketing and Sales

Jim, the new admin for Epicor Commerce needs to set up promotions, customize the sales process, and utilize sales reps.

Choose a topic to continue.

Objectives

* Promotions
* Search Functions
* Sales
* Sales Reps

Promotions

While creating promotions, you decide who to incentivize to buy which product, how long to promote it, under what conditions, and at what cost. These can be specified through customer groups, attributes, length of promotion, conditions, and discounts.

Configuring Price Rules creates discounts and special offers through rules related to these five areas.

Jim has a new line of hardware with a higher margin and wants his repeat buyers to switch over to this product. Before we see how he sets up this promotion, there are two types of customizable rules in Epicor Commerce – Catalogue rules and Cart Rules.

Catalogue rules and cart rules follow a similar formula; however, catalogue rules are applied on products based on attributes (like category) while cart rules are applied on the entire cart (like a subtotal).

Product attributes can also include SKU, material, size, or specific tags like “new” or “promotion.”

Cart attributes include subtotal, total item quantity, total weight, shipping method, postal code, or region.

First, decide whether to use a catalogue rule or a cart rule.

Since Jim’s promotion is related to product attribute, we will demonstrate a catalogue price rule.

Navigate to Marketing > Catalogue Price Rule. Select “Add New Rule.” Enter a name and description to help you reuse the rule later. Change “Active” to “Yes” so the discount is immediately applied. Shift-click to select multiple sites where the rule will be applied, select the customer group you are targeting, and enter the promotion period.

Expand conditions. The condition, when true, will trigger the promotion. In this case, if the product’s “Category” is tagged as “Promotions” then apply a percentage discount amount of 20% or “.2.” There are several options for the discount to be applied either to the product itself, or the final price. Select save.

As you can see, this creates a lot of flexibility to cater promotions to specific customer groups.

After customers find their product and apply their discount, sales and transactional emails can be automatically sent using templates. Templates also exist for contact us emails, welcome emails, and subscriptions to name a few.

Templates can be found within Marketing > Email Templates. Add a new template and choose from the “template” options.

From the configuration menu, scroll down to enable and assign templates for Sales emails through SALES > Sales Emails. Transactional emails such as “abandoned cart” can be enabled through a 3rd party extension.

Tap the arrow to continue.

Search Functions

When customers find products using refined searches, they are more likely to make a purchase. Let’s explore how to streamline your search functions.

Navigate to the configuration menu. Under Epicor Configuration, select “Catalog Search”. Setting “Search Catalog by Customer SKU” to “yes” allows customers to enter SKUs to find exact items instead of spending time searching. Determine values for where customer SKUs display in the results. Save Config.

Elasticsearch, a search and analytics engine, must be enabled to help your customers quickly find what they want.

Navigate to Catalog > Catalog

Expand the Catalog Search section. To change default settings, uncheck the “use system value” boxes. Set “Enable EAV Indexer” to optimize search speeds.

The autocomplete limit field determines how many lines appear when customers give a search suggestion.

Ensure the Search Engine listed is Elasticsearch 7 or higher.

As a best practice, only enable search functions you consider valuable because the wider the search, the slower the site will perform.

As you scroll down, you may enable search recommendations, search suggestions, ECC (or Epicor Commerce Connect) Auto Suggestion, Products, “Did you mean” suggestions, Categories, CMS Pages, Recent Search, and Hot Search. Select Save Config.

Boost or bury products within search results based on rules you define. These rules can be set within each store and provide a lot of control for which items receive priority in customer searches.

In Reports > Search Terms, we can see the search terms customers are using. Here, we can find common misspellings or even a sales opportunity for a frequently searched item not yet in your store. For example, you may notice that your customers have a variety of spellings for “veneer” or that many type in “decorative wood” – forgetting the name.

Redirecting customers to the correct page for common misspellings or products with multiple names can be done through Marketing > Search Synonyms.

Select “New Synonym Group.” Limit the scope to, for example, your English-speaking stores and type in the correct term - including several alternative terms and misspellings. Select “Save Synonym Group.”

Tap the arrow to continue.

Sales

One of Jim’s loyal customers is making a large order and would like a discount.

Requesting a quote at checkout can be enabled through Epicor Configuration > Quotes.

Ensure that “Quotes Enabled” is set to “Yes.” The general section allows you to define the number of days the quote is valid in the “Quotes Expire in x Days” field. Managing multiple quotes is easy with the “Select Quote Status to Confirm/Reject” box. Select multiple statuses using CTRL Click.

With this set up, Jim needs to see if he has any pending quotes.

Navigate to Epicor > Quotes and select a quote to view. Here, you can see the items requested, when the quote expires, the information of the customer, and the requested price. You can accept or reject the quote and leave a comment to the customer.

Checkout includes adding shipping addresses, choosing the shipping method, reviewing the order, and payment. Customers who have created an account will have prefilled shipping address information.

Define checkout settings starting in the configuration menu. As always, select which store you would like the configuration to apply. Select Sales > Checkout. Explore the configurations. One notable configuration is choosing to allow guest checkout. If “no” is selected, purchases can only be made after creating an account.

Epicor Commerce’s Payment Gateway is a service that your site uses to accept payments during checkout. Customers have a variety of payment options including CRE for Kinetic/Epicor ERP users and Elements for Prophet 21 users.

Returns can be accessed through Epicor Configuration > Returns and can include flexibility with email alerts, status updates, and returns for B2B customers.

Subscriptions allow customers to automate repeated purchases. To enable subscriptions for a product, navigate to Catalog > Products. Edit a product. Scroll down and expand "Subscription settings." Set to "Yes, use global subscription settings." Select “Save.” In the Epicor Configuration menu, scroll down to “Subscriptions and Recurring Payment.” Select the available subscription options, and specify labels and email notifications. Select “Save Config.” A “Subscribe Now” button will now appear in the front end with your specifications.

Tap the arrow to continue.

Sales Reps

If you utilize sales representatives who create orders, give demonstrations, train customers, or serve as an internal support role, you’ll need to import them as ERP account customers. Note that not all ERP systems support sales reps.

To add a sales rep customer, navigate to Customers > All Customers and select “Add New.” Enter and adjust any relevant customer account information.

From the side menu, select ERP account type, then from the ERP Account Type drop down, select Sales Rep. Click “Select” and assign a sales rep. Finally select “Save Customer. “

As an admin, you can select the pricing rules for the sales rep. To define these rules, navigate to Epicor > Sales Rep Accounts and select an existing sales rep. Select “Pricing Rules” from the left panel, and select “Add.”

Set the date range for the rule, priority against other rules (higher numbers are higher priorities), and conditions to determine when the rule is applied. Like catalogue rules, this can be based on product attribute, category, or some other condition combination.

Pricing rules for sales reps are set by either the minimum cost or by the maximum discount. “Cost price” means that a minimum margin on the cost of the product must be hit to be eligible to sell. For instance, the cost price plus 30%.

The “product price” rule says that a maximum discount can be set from the customer specific price. For example, the sales reps can give a maximum of a 10% discount.

Items can be marked as non-discountable and can have several rules applied with various priority levels given to them.

The process to assign sales reps to ERP accounts and customers is nearly identical. Select ERP accounts.

The “Reset Filter” button displays available ERP accounts. Select the check boxes to associate the sales rep with the ERP. That sales rep will now be able to masquerade as this account and make orders on their behalf. Select “Save and Continue Edit.” Assigning Sales Reps to customers is done the same way through the “Sales Reps” tab.

Tap the arrow to continue.

Recap

You’ve seen how to customize promotions, basic search functions, the sales process, and how to utilize sales reps.

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