



Epicor Application User Guide

Introduction

The Epicor ERP Application User Guide contains a complete overview of the major ERP modules. This guide begins with application you can leverage to fine-tune ERP to match the business needs of your organization. You examine how to setup features. Together, these chapters round out the primary information you need to know about the Epicor application.

The Epicor Environment

The Epicor application is a feature-rich Enterprise Resource Planning (ERP) software package. In order to gain a thorough understanding of the application, you must first understand the environment in which it operates.

Customer Relationship Management

Customer Relationship Management (CRM) is equipped with the tools you need to find more prospects and quickly convert them into customers. You track it within the application through events, activities, and ultimately the leads generated from the event. The response point, leads are tracked through the application to the eventual order. The chapter begins with setup steps to create a successful advertising campaign.

Opportunities and Quotes

Use the Quote Management module to enter and maintain leads, opportunities, or quotes in the application. A quote is a sales order for follow-up. Existing quote information can be transferred to a sales order or job in several ways. The quote can be converted to a sales order. If the Customer Relationship Management (CRM) module is enabled, a quote can be marked as won, which automatically generates an order.

Demand Management

Use the Demand Management module to more efficiently manage short and long term customer demand contracts, analyze, edit, and reconciliation of cumulative records for releases from your trading partners. If you use Electronic Data Interchange (EDI), you can use the Demand Management module to manage demand contracts.

Sales Order Processing

The sales order process is a flexible system you can use to create everything from single release sales orders to complex multi-line sales orders. You can create a new sales order from an existing quote, make the changes you need, allocate it to a job, and then create a sales order from the job.

Configurator

You use the Configurator to create an interface that streamlines entry of sales order options for products with multiple configurations.

Epicor 905 Application User Guide

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