EPICOR

Epicor Help
Classic User Interface Help
Getting Started with Epicor ERP
Epicor ERP User Guides
Epicor Implementation User Guide
Epicor Application User Guide
Tools User Guide
Customization User Guide
Service Connect User Guide
Advanced Financial Reporting User Guide
Enterprise Performance Management User Guide
Country Specific Functionality
Accounts Payable
Accounts Receivable
Advanced Material Management
Advanced Project Management
Asset Management
Case Management
Cash Management
Configurator
CRM
Currency Management
Data Collection

Epicor Application User Guide

Introduction

The Epicor ERP Application User Guide contains a complete overview of the major ERP modules. This guide begins wit
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 applic

The Epicor Environment

The Epicor application is a feature-rich Enterprise Resource Planning (ERP) software package. In order to gain a thoro

Customer Relationship Management

Customer Relationship Management (CRM) is equipped with the tools you need to find more prospects and quickly co
track it within the application through events, activities, and ultimately the leads generated from the event. The respo
point, leads are tracked through the application to the eventual order. The chapter begins with setup steps to create
your advertising publications.

Opportunities and Quotes

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

Demand Management

Use the Demand Management module to more efficiently manage short and long term customer demand contracts,
analysis, editing, and reconciliation of cumulative records for releases from your trading partners. If you use Electron

Sales Order Processing

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

Configurator

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

Epicor 9application User Guide

Kathleen Armour

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