Epicor Release Guide
What's New in...
Epicor Retail CRM 6.1
March, 2010
About This Guide

Epicor Retail CRM Release 6.1 includes many exciting enhancements as well as brand new functionality. This document explains the enhancements and the benefits they will bring to you.

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Overview: Epicor Retail CRM and Enhancements in Release 6.1

Products That Comprise Epicor Retail CRM

Information Center – repository for all customer information, replication of customer information, data cleansing, import/export options, thin client customer inquiry, contact management and web objects for customer database integration with your web based marketing channels

Insights Manager – campaign management, points based loyalty program management, 30 flexible reports and a library of web parts for building a customer dashboard

Store – viewing, editing and creation of customer records at POS, and one-to-one messaging at the register or out on the sales floor with a mobile device

Release 6.1 Features at a Glance

Internationalization Enhancements
• Key fields support Unicode characters
• New languages supported

Security
• Secure passwords
• Integration with Secure Data Manager (as of 6.1.002.000 only)
• Support for Secure FTP (as of 6.1.002.000 only)

Customer Inquiry
• Enhanced navigation
• Ability to print a customer record

New Report Link Web Part for Customer Dashboard

Various Reporting Enhancements

Performance Enhancements for the Following Functionality:
• Purchase Cycle Analysis report
• Cross Shopping Analysis report
• Customer Imports
• Transaction Imports
• Replication

POS CRM Enhancements (Store 6.2 or higher)
• Assign membership types at POS
• New Customer Summary screen
• New Recent Items screen
• Enhanced navigation
Enhancements and Benefits

Internationalization

The database has been enhanced so that key fields support the storage of any Unicode character defined in the Unicode 3.0 standard. This enables retailers to expand globally and continue to use the Epicor Retail CRM solution.

Fields that support Unicode

- **Customer fields include:** first name, last name, alpha key, e-mail address, user name, password and salutation
- **Address fields include:** address 1-6, postal code, carrier route, address match key and household match key
- **Other fields include:** sales associate name, sales associate aka and attribute comment

A sample customer record containing Unicode data.

Thirteen new languages have been added to Multilingual Description Maintenance. Once you’ve filled in the translations your sales associates and call center staff will be able to work in their language of preference at POS or within Customer Inquiry.
Security

Passwords

NT authentication is now supported enabling users to log on to their network and not have to log in to the CRM solution separately.

Automatic password expiration is now supported for users that use a login/password for the CRM solution (as opposed to users using NT authentication). Users will now be prompted every x days to create a new password to log into the CRM solution.

Keeping in tune with data security standards, internal CRM passwords now enforce complex passwords and these passwords are now encrypted.

Integration with Secure Data Manager

As of Maintenance Release 6.1.002.000, CRM is now integrated with Secure Data Manager (SDM) for enhanced payment card number security. SDM is a secure, PA-DSS validated central repository for storing all sensitive payment card number data. CRM now uses tokens provided by SDM for alternate key storage and for comparisons during transaction matching and customer look-ups. With SDM integration complete, payment card numbers are no longer stored in the CRM database.

Secure FTP

As of Maintenance Release 6.1.002.000, Secure FTP will be used to transfer files.

Customer Inquiry

Enhanced Navigation

The Search results screen has been expanded to include city and state columns enabling users to quickly find the exact customer record they are seeking.

Promotions on the Promotion screen are now sorted in descending order so the most recent one appears at the top of the list.

Two new buttons, “Next” and “Previous” have been added to the Transaction and Rewards screen for easier scrolling. Also, when moving from detail to header transaction view, the system will now keep track of the transaction being viewed and will no longer bring the “selection” back to the first transaction in the list. The column headers are now frozen such that they are always visible no matter how far the user scrolls down.

Note the new “Next” and “Previous” buttons on the bottom right hand side.
Ability to Print Customer Records

Users can now print a customer record from Customer Inquiry. When the “Print” button is selected the user will be asked to specify the customer information to include in the report. Users can also save the Customer Inquiry report for easy distribution.

Customer Dashboard

Promotion Web Parts

A look-up box has been added for promotion IDs, facilitating quicker selection. A new option to display ended promotions only has also been added.

Capture Rate Trend Web Part

Six new levels of detail, each with their own lookup boxes for user-friendly selection, have been added. These levels include: division, region, district and store groupings A, B and C. You can now pick and choose exactly what capture rates to display.

Report Link Web Part

A brand new Report Link Web Part has been added enabling you to easily share key reports in their entirety within your organization. The five reports that use Microsoft Reporting Services (Database Analysis, Cross Shopping Analysis, Multivariate Cross-Tab Analysis, Purchase Cycle Analysis and Multivariate Category Analysis) to display their report results are available for selection in this new Web Part. In addition to displaying the report title you can also include report comments to explain what each report is analyzing. End users of the dashboard are able to save the reports to Excel for further analysis.

A sample Customer Dashboard displaying various reports using the new Report Link Web Part.
New Parameter

Lastly a new parameter called Grid Properties has been added to the Web Parts so you can control how many rows to display when in grid view. This will reduce or even eliminate the need to scroll through pages when displaying large amounts of data.

Reporting Enhancements

Multivariate Category Analysis Enhancements

The Multivariate Category Analysis report has been enhanced to include seven new “% of Total” columns. As well, when the report is run on Customers (as opposed to Households) the following household columns are available for inclusion in the report results:

- Households (count)
- Average Customers per Household
- Average Units per Household
- Average Transactions per Household
- Average Visits per Household
- Average Household Retail
- Average Household Retail with Cost
- Average Household Margin
- Household % of Total
- Household % of Set 1 (depending on presentation style chosen)

A new criteria option of “# of Stores Shopped” has been added to the drop down box to help you analyze customers shopping habits. Automatic range descriptions based on chosen criteria have been added to save you time when defining your report criteria.

Seven new “% of Set 1” columns have been added to the comparative cross-tab presentation style. A new field called “Overall Customer Totals” has been added to the report summary section to help clarify the calculation of the “Customer’s % of Total” field.

<table>
<thead>
<tr>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set 1: 2005 Transactions</td>
</tr>
<tr>
<td>Category</td>
</tr>
<tr>
<td>Active Customer Totals:</td>
</tr>
<tr>
<td>Customers</td>
</tr>
<tr>
<td>Net Retail</td>
</tr>
<tr>
<td>Margin</td>
</tr>
<tr>
<td>Customers % of Total</td>
</tr>
<tr>
<td>Inactive Customer Totals:</td>
</tr>
<tr>
<td>Overall Customer Totals:</td>
</tr>
</tbody>
</table>

The new “Overall Customer Totals” field will enable users to work back the “Customers % of Total” field.

\[
\frac{53,584}{97,091} \times 100 = 55.19\%
\]
Cross Shopping Analysis Enhancements

The Cross Shopping Analysis report has been enhanced to include the same list of household columns as the Multivariate Category Analysis when the report is run on Customers. In addition the following fields have also been added:

- Cross Shop Index by Households
- All Households
- % of Households to All
- % of All Households
- % of Households to Chosen

Multivariate Cross-Tab Analysis Enhancements

The Multivariate Cross-Tab Analysis report has been enhanced by adding a “Basket Analysis” option. This enables you to analyze the contents of a transaction, a visit or look at a customer’s lifetime of purchases. Rankings can now be assigned at the axis level and an alphanumeric sort option has been added. Lastly, Net Cost % of Row/Column/Total have been added as available fields.

Performance Enhancements

Epicor surveyed clients regarding functionality that needed improvement in performance. The survey results were then used to form the basis of the performance enhancements initiative that was part of CRM 6.1 project. The focus areas were as follows:

- Customer Imports
- Transaction Imports
- Replication
- Purchase Cycle Analysis report
- Cross Shopping Analysis report

Improvements were gained with customer imports using consolidation or householding and transaction imports have seen improvements up to 44%. Replication has had several processes rewritten for greater efficiency including the replication purge log which is now running 100 times faster than before. The Purchase Cycle Analysis report now runs up to 66% faster while the Cross Shopping Analysis report is up to 38% faster.

Replication

A new “Replicate All” option has been added to Database Maintenance to enable all newly created distributable customer records to automatically replicate, so there is no need to define areas in Area Maintenance.

Miscellaneous

Some terminology found within Scoping/Create List has been updated to follow the standard used for the various report enhancements that were part of CRM 6.0. For example, amount is now referred to as retail and item is now referred to as unit.

Manually created transactions will now be able to have non-tokenized tender types added to them.

Product code has been added to Scoping and Create List.
Store 6.2 CRM functionality

Assign Membership Types at POS

An option has been added to access QAS’ QuickAddress Pro address standardization solution when creating or modifying customer records. When creating customer records the user will automatically invoke QAS when they tab into the street address field. Once the zip code is entered, the city and state are automatically populated and the solution will ensure the user inputs a mailable street address. When modifying a customer’s address, the user must select the QAS button in order to make use of the functionality.

A new “Home” button has been added to help speed up navigation within POS CRM. When the user clicks on this button they’ll be brought back to the main customer information screen. Attributes are now quicker to add as fewer clicks are required.

Sales associates now have the ability to assign a membership type at POS. This means customers can accumulate reward points for their first transaction. The membership type description will now be displayed in place of the membership code and retailers will be able to decide which membership types can be assigned at POS.

New Customer Summary Screen

A brand new Customer Summary screen has been created so sales staff can see on one screen various pieces of customer information that were previously only found on various screens. This new Customer Summary screen is a “one-stop” overview of the most useful non-transactional information sales associates need.

The new Customer Summary screen containing various types of customer information.
New Recent Items Screen

A brand new Recent Items screen has been created to display the last x (it's parameterized) items purchased by the customer. The screen shows detail level information without requiring the sales associate to drill-down.

Households

Users can now jump to a household member's account from the Household screen thus eliminating the need to launch a new search.

Mobile CRM Enhanced Navigation

The Mobile CRM offering also has some new enhancements. These include enhanced navigation and user interface as well as the ability to “toggle” between multiple customer records. Sales associates will be equipped with the tool they need to service multiple customers out on the sales floor.

System Requirements

Database Server(s)

Hardware

The database server hardware specifications are based on an analysis of the client's estimated database size, application usage, choice of RDBMS and Operating System.

Operating System and Software


Application Server hosting CRM SmartLoads, Customer Inquiry, Textio, and Address Standardization Service

Hardware

The application server hardware specifications are based on the client's database size and expected Web volume (if applicable).

Operating System and Software

Microsoft Standard Windows Server 2003 SP2 x86 or Windows 2000 Server SP4 x86. The appropriate East Asian Language pack is required to support Unicode.

Microsoft Internet Information Server 6.0 with the following components

- Common Files
- FTP Service
- Internet Services Manager
- World Wide Web Service
- Microsoft ASP.Net 2.0

Microsoft Core Services 4.0 RTM
Microsoft Internet Explorer 6.0 SP2 or 7.0.5730.13 or 8.0
.Net Framework 2.0 (if Win 2000, .Net must be installed only after installation of MS IIS 6.0)
MDAC 2.8 +

Enabled COM+ Services access (for Contact Manager)

Address standardization software (optional):
• QAS QuickAddress Batch v. 4.57+
• SmartSoft Accumail (USA) Batch API v. 9+

Database client software (as applicable)
• Microsoft SQL 2000 Client with SP4, Microsoft SQL 2005 Client with SP3

MKS Toolkit 9 with latest patch

Remote Desktop (for Windows servers)

Windows local or domain administrator account to install Windows services, record data in the registry, create web sites in IIS, and set folder permissions

RDBMS login to run implementation

User with permissions to ftp, run SmartLoads Windows services, run Textio Windows Scheduled Tasks

Network connection to the following servers:
• CRM HOST Database Server
• CRM POS Database Server
• Encryption Server
• Foundation Database Server

**Application Server hosting CRM Customer Reporting and Customer Dashboard**

**Hardware**
The application server hardware specifications are based on the client's database size and expected Web volume.

**Operating System and Software**
Microsoft Standard Windows Server 2003 SP2 x86. The appropriate East Asian Language pack is required to support Unicode.

Microsoft Reporting Services with SP2 (installed as part of SQL Server 200*)

Microsoft Windows SharePoint Services 2.0 SP2 or 3.0 installed as a Server Pool (NOT MSDE) (Version 11.0.7969.0) (Domain account user mode)

Microsoft Internet Information Server 6.0 with the following components:
• Common Files
• Internet Services Manager
• World Wide Web Service
• Microsoft ASP .Net 2.0
• SMTP mail server (optional, for E-mail delivery of Reports)

Microsoft Internet Explorer 6.0 SP2 or 7.0.5730.13 or 8.0
.Net Framework 2.0
MDAC 2.6 +

Database client software (as applicable)
• Microsoft SQL 2000 Client with SP4, Microsoft SQL 2005 Client with SP3

Remote Desktop (for Windows servers)

Windows local or domain administrator account to run implementation

User with permissions to run Reporting and DashBoard Windows services

Domain user to run reportGenerator

Network connection to the following servers:
• CRM HOST Database Server
• Foundation Database Server
• Foundation Services Server

Web Extensions Server
Microsoft Internet Information Server 6.0 with the following components:
• Common Files
• Internet Services Manager
• World Wide Web Service
• Microsoft ASP .Net 2.0

.Net Framework 2.0

MS SQL Client

Network connection to the following servers:
• CRM Replication Database Server
• Foundation Database Server
• CRM Host Database Server (if detailed loyalty inquiries are required)
• Foundation Services Server

Application Server hosting Encryption Service

Hardware
The application server hardware specification is based on the client's database size.
Operating System and Software
Microsoft SQL 2000 Client with SP4 x86. Microsoft SQL 2005 client with SP3 x86

The appropriate East Asian Language pack is required to support Unicode.

Remote Desktop (for Windows servers)

Windows local or domain administrator to run implementation

User with permissions to run Encryption Windows services

Network connection to the following servers:
- Encryption Database Server
- CRM HOST Database Server
- User PCs with encryption certificates
- Foundation Database Server
- Foundation Services Server

Client Workstation

Hardware
Intel Pentium IV 1 GHz or better

512MB RAM

10GB Disk Space

8MB RAM Video Card

800 x 600 Screen Resolution (1024 x 768 recommended)

Operating System and Software
Microsoft Windows XP Professional SP2 x86. The appropriate East Asian Language pack is required to support Unicode.

Microsoft Internet Explorer 6.0 SP2 or 7.0.5730.13 or 8.0
About Epicor

Epicor Software (NASDAQ: EPIC) is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in over 150 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability. Founded in 1984, Epicor celebrates 25 years of technology innovation delivering business solutions that provide the scalability and flexibility businesses need to build competitive advantage. Epicor provides a comprehensive range of services with a single point of accountability that promotes rapid return on investment and low total cost of ownership, whether operating business on a local, regional or global scale. The Company’s worldwide headquarters are located in Irvine, California with offices and affiliates around the world. For more information, visit www.epicor.com.