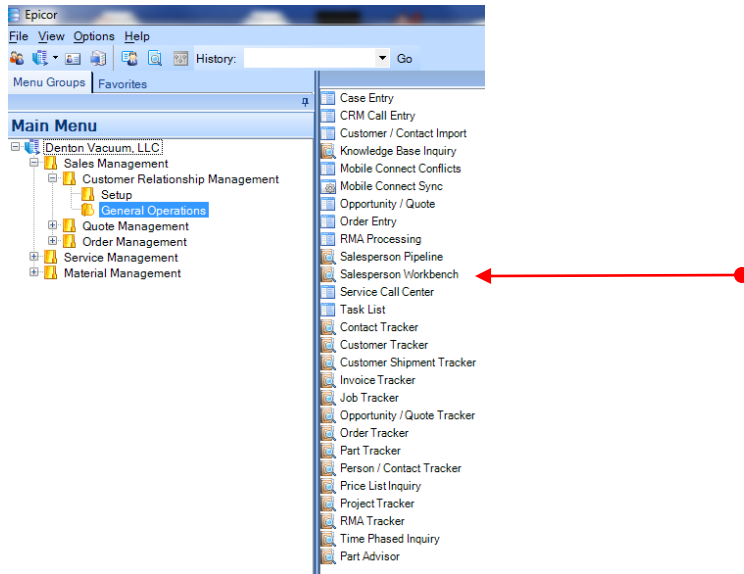Open Epicor using your login credentials.

From the General Operations folder, click on Salesperson Workbench

 CAUTION: Before you undertake any action in Epicor CRM, click on the **REFRESH** button to ensure that you are working with complete, current data. Always remember to **SAVE** data when finished entering data into Epicor. These two actions will prevent much user error. Last, every screen provides different **ACTIONS options** based on the information the current screen displays. In the CRM Calls screen, for example, you can **ATTACH** documents; in the Salesperson Workbench, **Opportunity/Quote** is among the action choices.
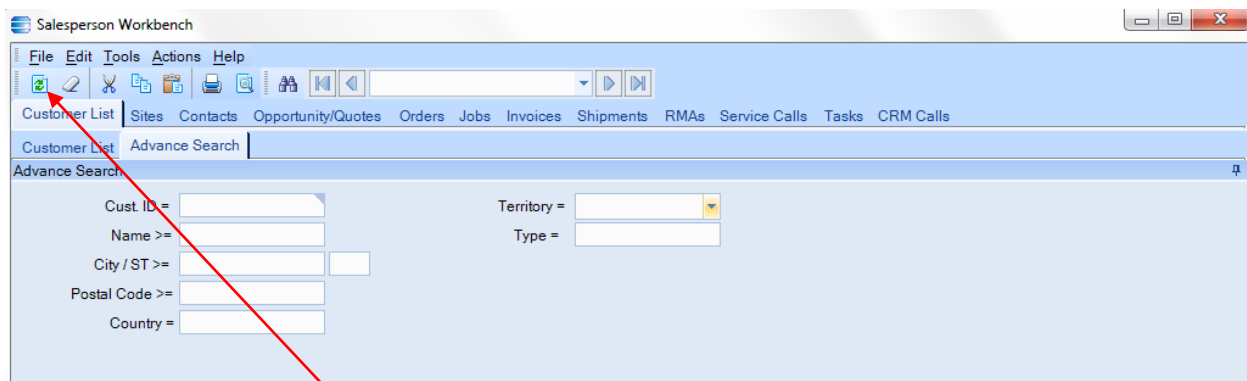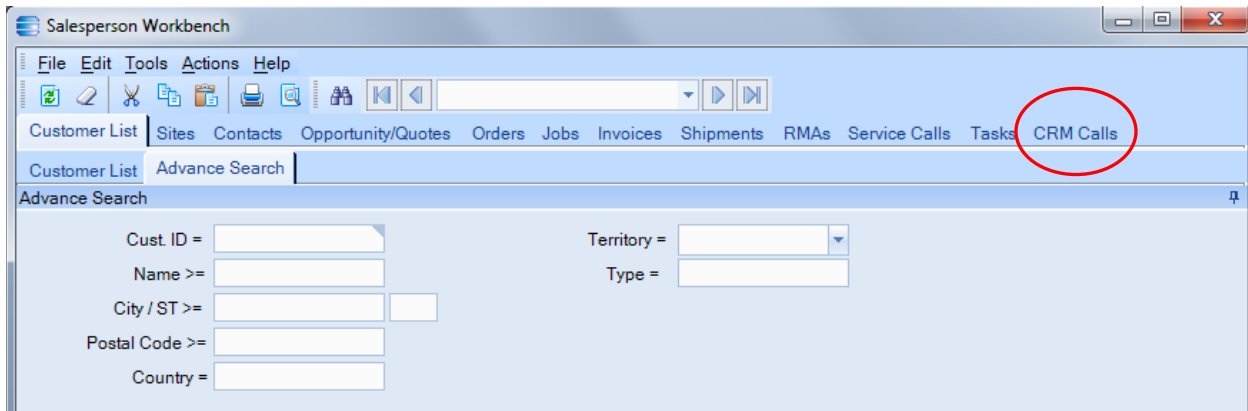

Use **REFRESH** button before any action

Use **SAVE** button after every data entry or change action
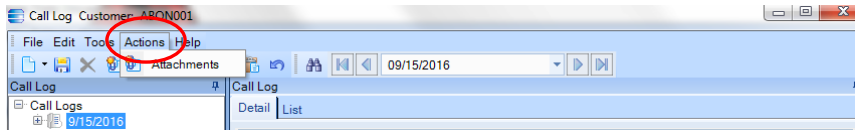
NOTE the **ACTIONS** button **reflecting** options based on the information on the current screen display.

Select CRM Calls.

Leads assigned to you are found in the CRM Calls screen below. **NOTE:** By default, Epicor does not order leads by latest received. Click the DATE column to sort by latest lead.
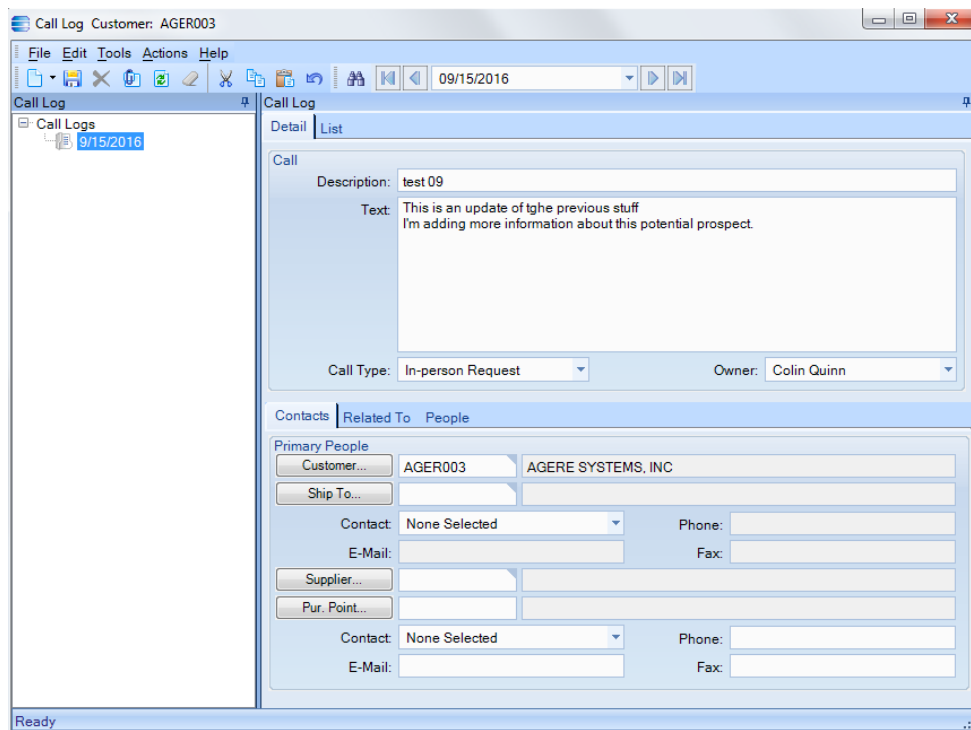
From the CRM Calls screen, you can perform two actions on these leads from this screen: You can ADD your own lead or UPDATE any of the leads presented in your assigned list.
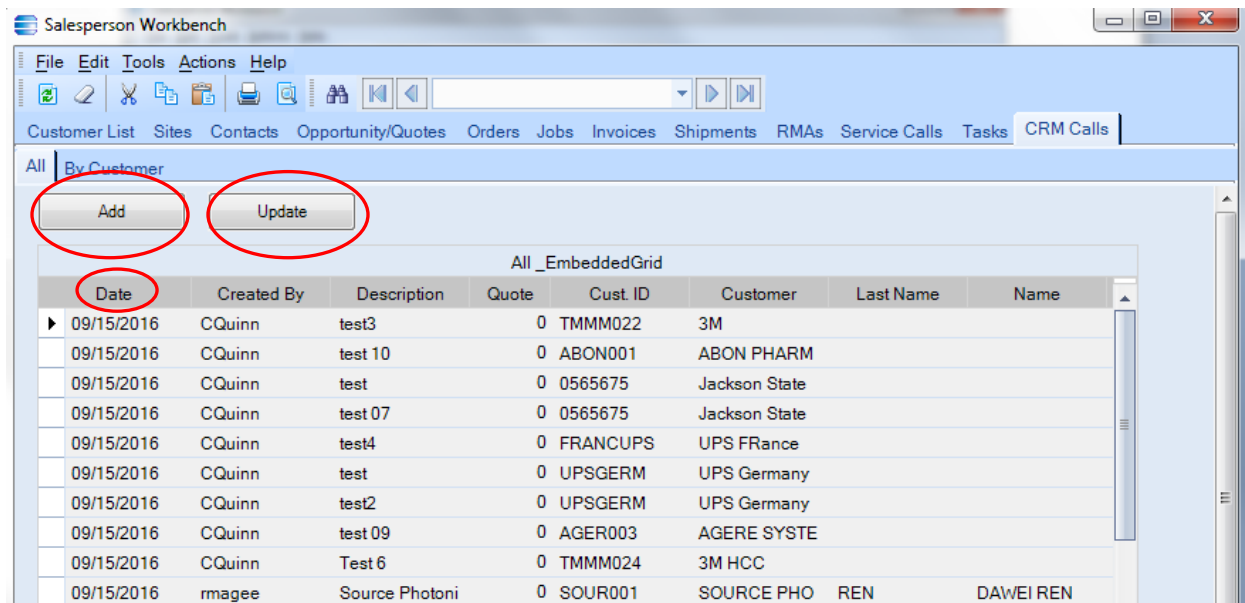
To **UPDATE** a lead, choose a lead by clicking on the row and highlighting that lead.
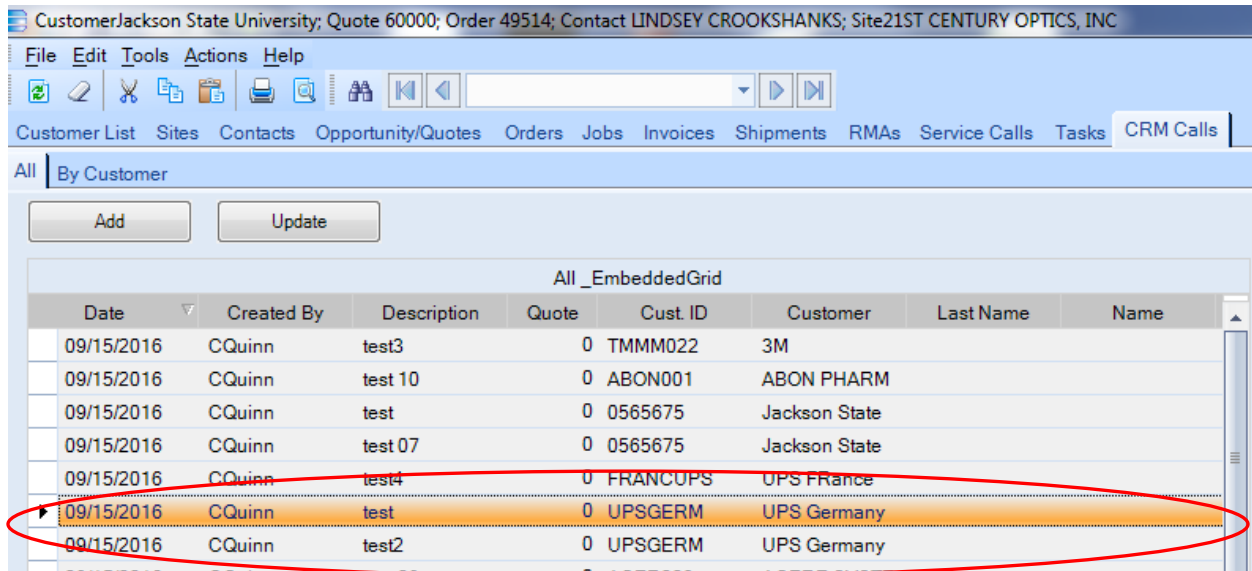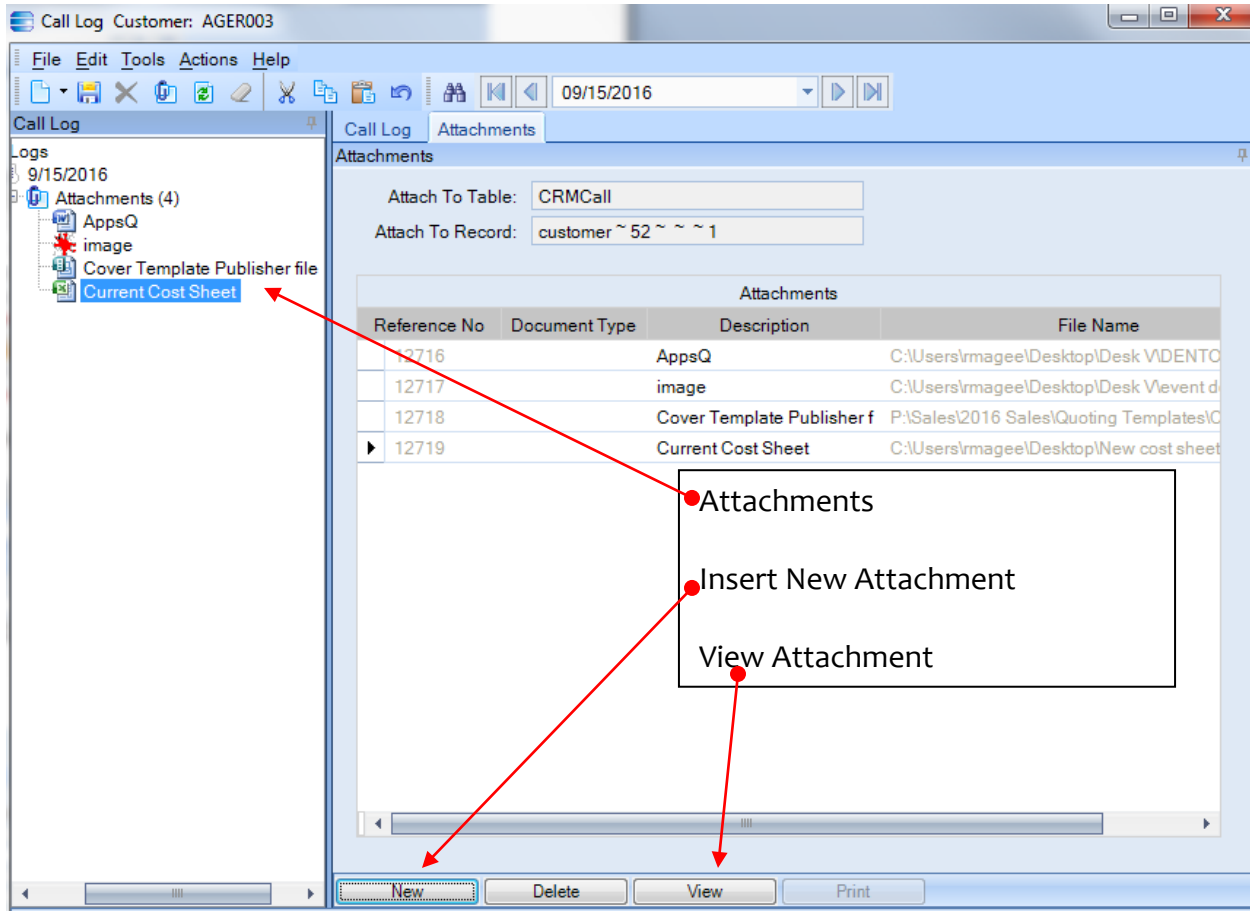

You can append the existing information, as seen below:

NOTE: You can also attach documents (AppsQ, Word, Publisher, Excel, etc) in your communication.

Attachments (you can expand or collapse the attachment tree by clicking on the + or – sign).
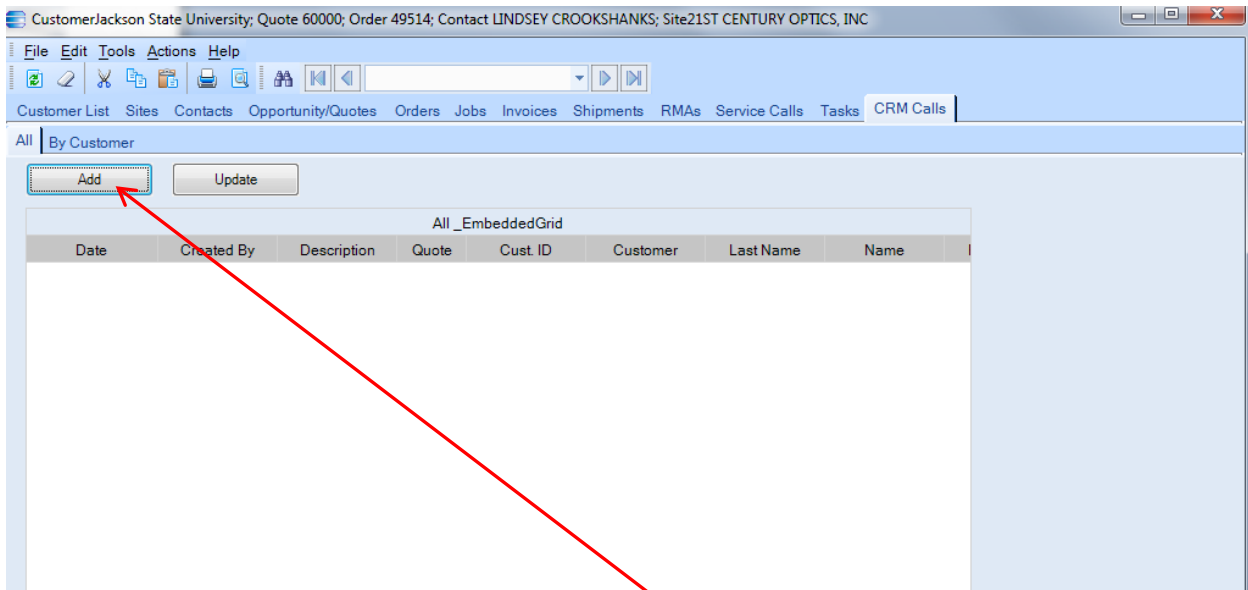

Attaching a file is similar to uploading any file: select file from the browse drop-down menu. Don't forget to provide a meaningful name to that file.
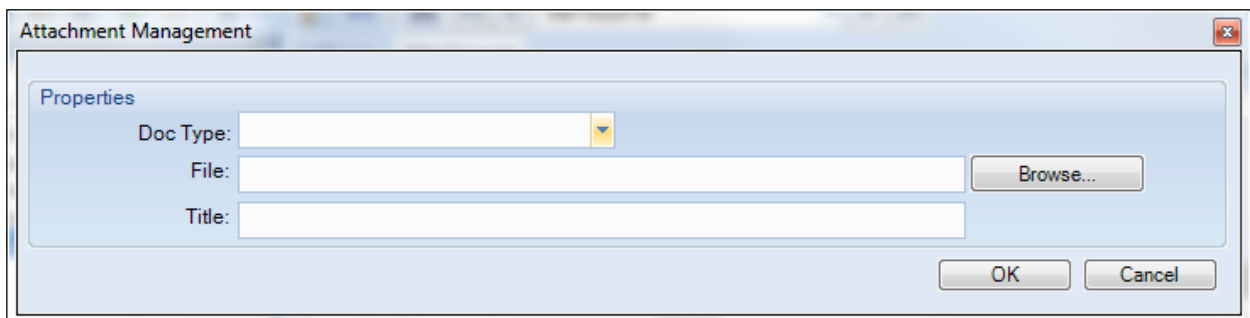
You can ADD a new lead to your list (or assign/share it with someone else). **NOTE:** To **ADD** a new lead, you need to **CLEAR** lead list as seen in the screen below:
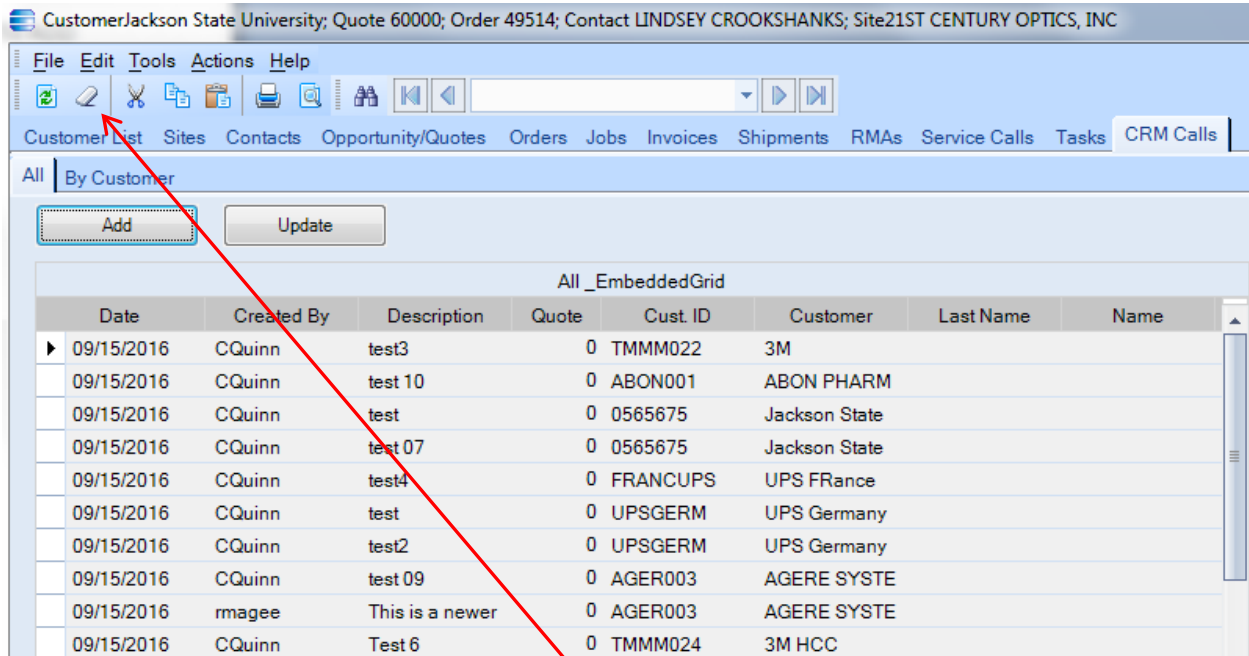

To **ADD** new lead, first **CLEAR** list by clicking on the eraser icon button.

With list cleared, click **ADD** button.

To create new lead, perform these 8 actions:

1. Refresh database
2. Click NEW button
3. Complete DESCRIPTION field
4. Complete TEXT field (actually optional but you will to communicate something)
5. From drop-down, identify CALL TYPE
6. From drop-down, choose OWNER (which sales person you wish to send to)
7. Identify customer (from data or create new customer)
8. If new customer, you must assign Terms (see below for creating new customer).
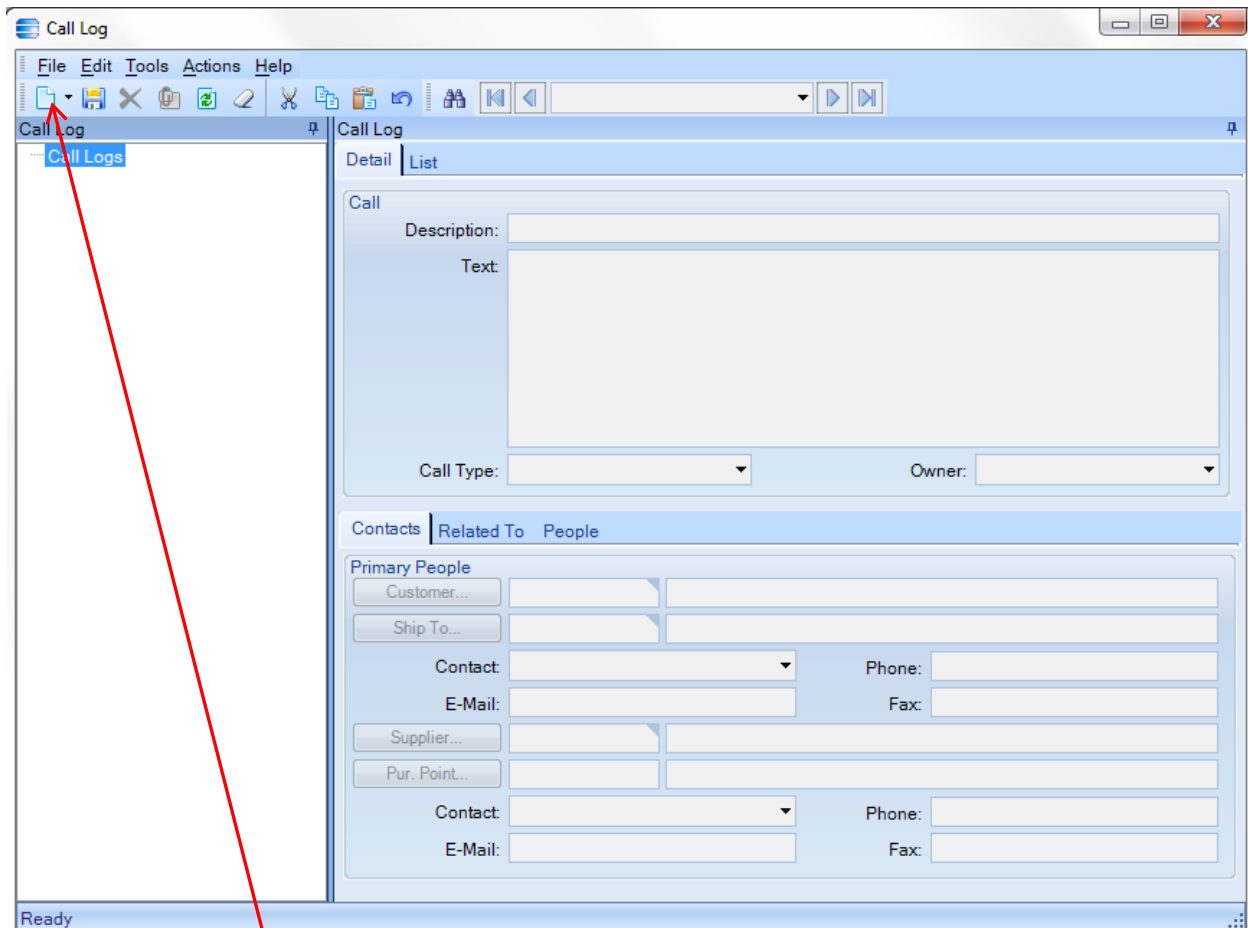
Click NEW button.

Complete **DESCRPTION** field
Complete **TEXT** message
Identify **CALL TYPE** from drop-down
Identify **OWNER**

NOTE: OWNER is tied to **TERRITORY** (Epicor CRM is driven by Territory); Colin is chosen as **OWNER** in the example below because the customer is in Germany, part of Colin's sales territory.
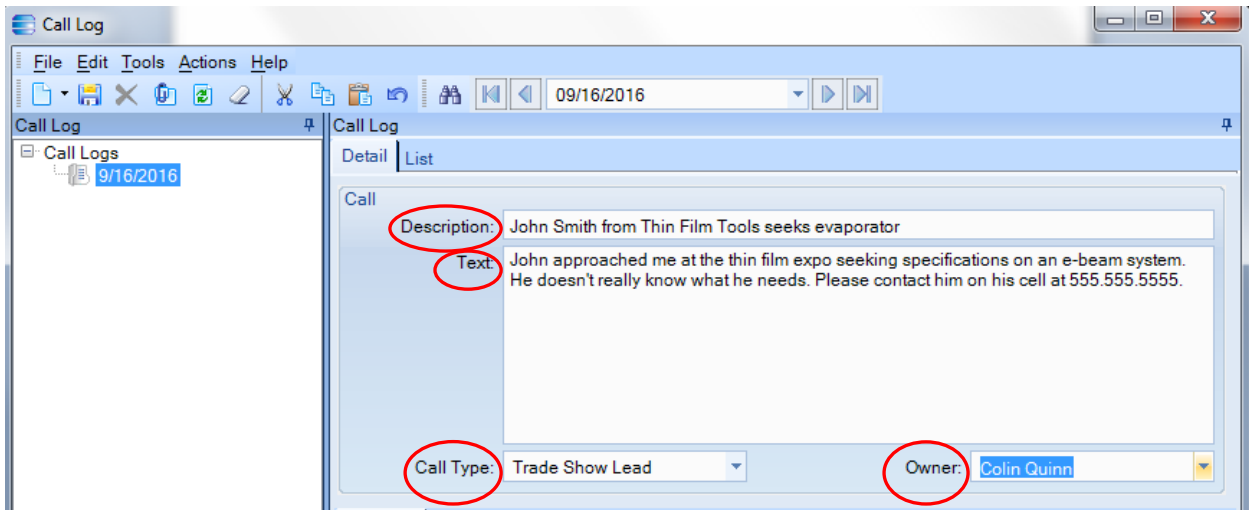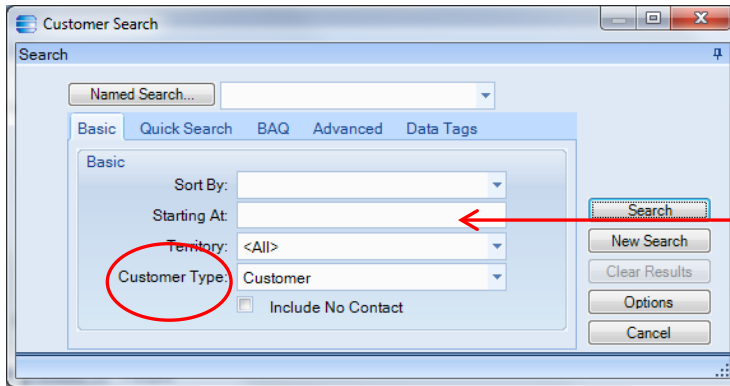

You identify **CUSTOMER** in two ways from this screen: choose existing customer from drop-down or create new customer.

Choose existing customer from drop-down:
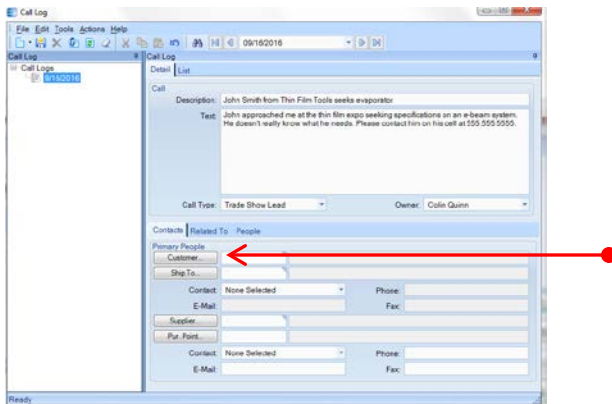
Click **CUSTOMER** button.

Perform a quick search: Make certain that the **CUSTOMER TYPE** Field is set to **CUSTOMER**.
In the **STARTING AT** field, type "Thin" for Thin Film Tool.
Click **SEARCH** button.

Search results did not find Thin Film Tools. If you sought Thinsilicon, the top entry on the search results list, you would highlight the row and click OK at bottom left of the search results screen to open that customer data.
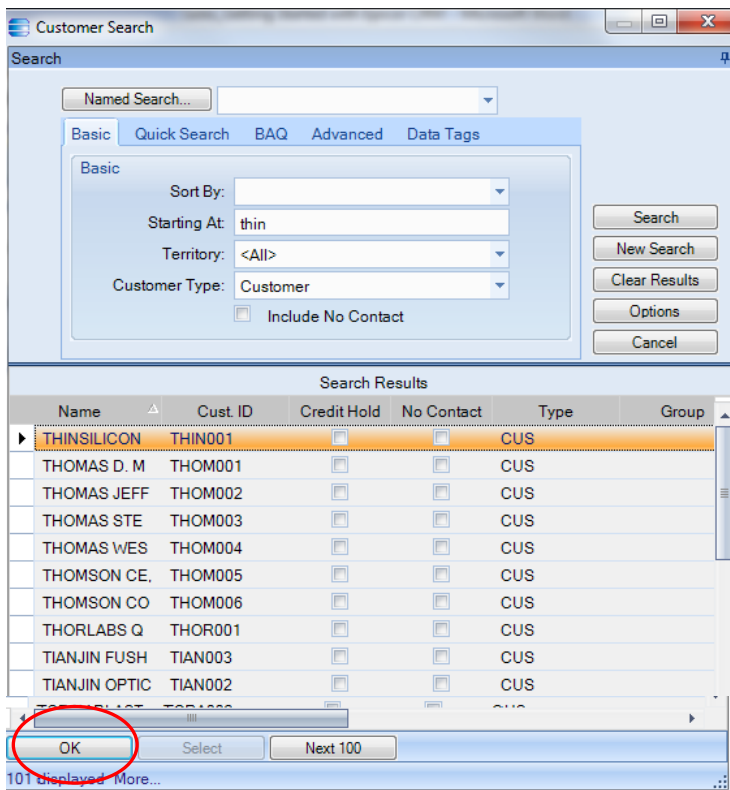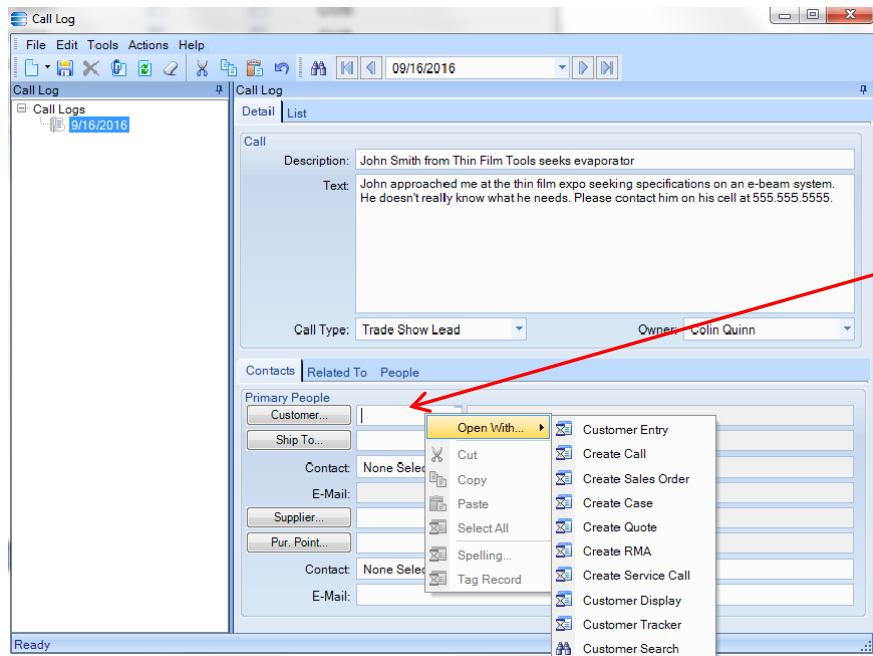
Creating new **CUSTOMER**
Place mouse cursor in the fields to the right of the **CUSTOMER** button.
Right-click with your mouse.
Choose **OPEN WITH**
Click **CUSTOMER ENTRY**

To create a new customer, you need to perform the following actions:

Click the **NEW** button (paper icon top left menu)
Enter eight-letter (Caps) **CUSTOMER** identifier code in filed to the right of CUSTOMER button.
Enter complete company name in **NAME** field.
Indicate customer **TYPE** from drop-down (choose among prospect or suspect; not certain why customer is a choice).
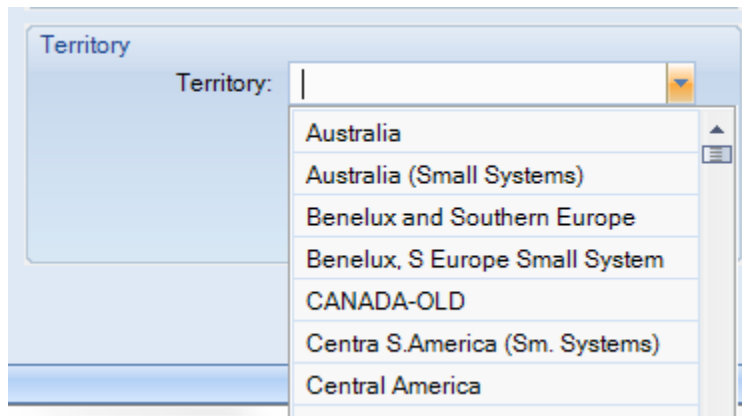Complete **CUSTOMER ADDRESS** fields.
NOTE: Per the importance of territory in Epicor, be certain to enter a correct city and country.
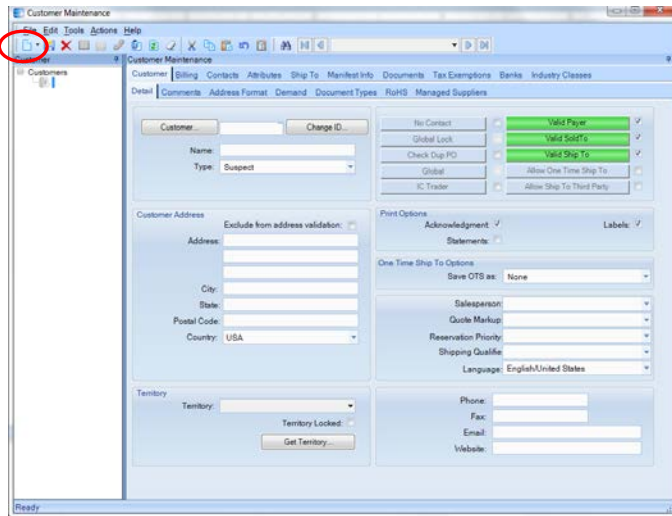
Identify the Territory from the drop-down **TERRITORY** list.
NOTE: "(Small systems)" after territory designates a microscopy tool territory.

Identify the **SALESPERSON** from the drop-down list. Colin Quinn will be selected in this example because Colin's sales territory includes DACH (Germany, Austria and Switzerland).

Complete the contact information for the new customer here.

Before you **SAVE** this new **CUSTOMER** entry, you need to indicate the payment terms for this customer (don't ask, Epicor won't place new customer in database without these payment terms).

To identify payment terms,
Click on **BILLING** tab

In the **TERM** drop-down list, choose any terms you wish.
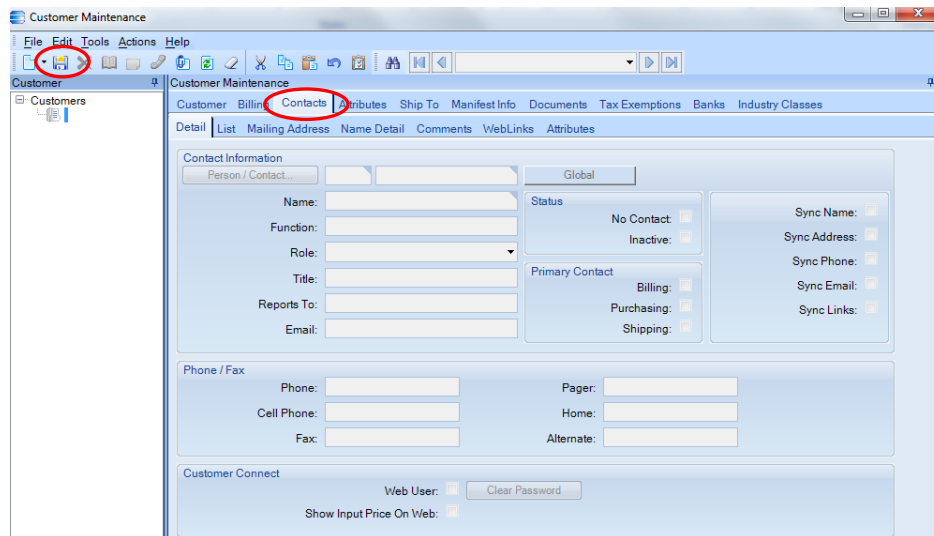
Before you **SAVE** this new **CUSTOMER,** you may wish to enter **CONTACT** information for John Smith at Thin Film Tools. To do so,
Click on the **CONTACTS** tab
Complete the information as you wish


You can now **SAVE** the new **CUSTOMER** data entry.

The last action in this getting started with Epicor CRM guide is instruction on how to use Epicor CRM's **OPPORTUNITY/QUOTE** function. We will perform our quoting much as we do now using Excel cost sheets, Word and Publisher files, PDFs and so on. The difference in using Epicor CRM will be that we simply attach these associated quoting files to the **CUSTOMER** data in Epicor. Additionally, we will enter financial data regarding the quoted pricing into the **CUSTOMER** profile in Epicor for financial reporting.

How to use **OPPORTUNITY/QUOTE** in Epicor:

As with all of Epicor CRM pathways, there are many ways to get to **OPPORTUNITY/QUOTE.**
NOTE: You can only employ this function with a customer entered into Epicor (you cannot quote simply from a lead).
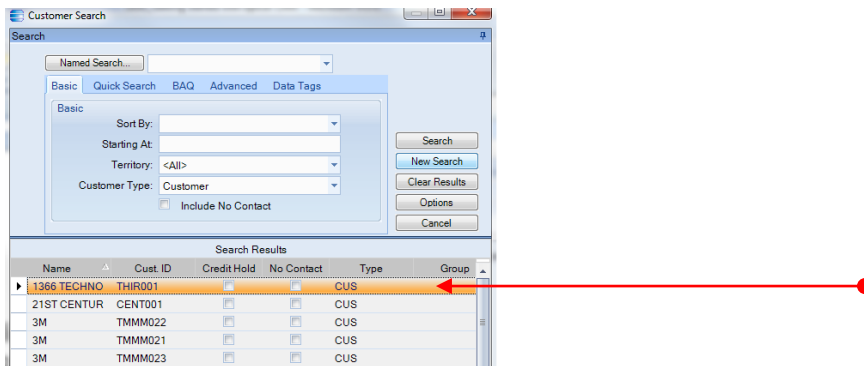
Here is one way.

From the **SALESPERSON WORKBENCH** and its **CUSTOMER LIST** (opening screen),
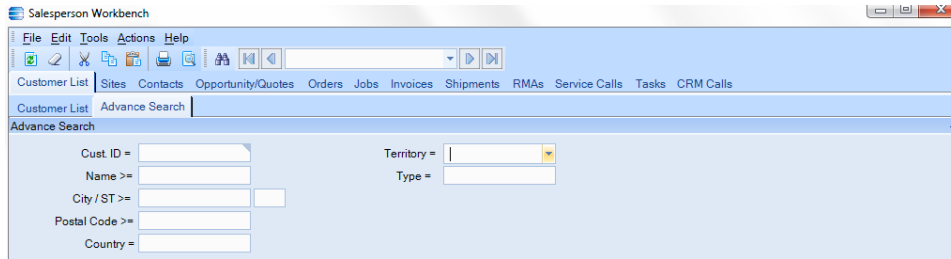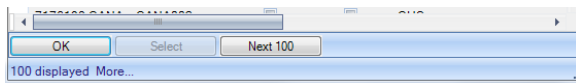

With your mouse, right-click on the field to the right of the **CUST ID** field
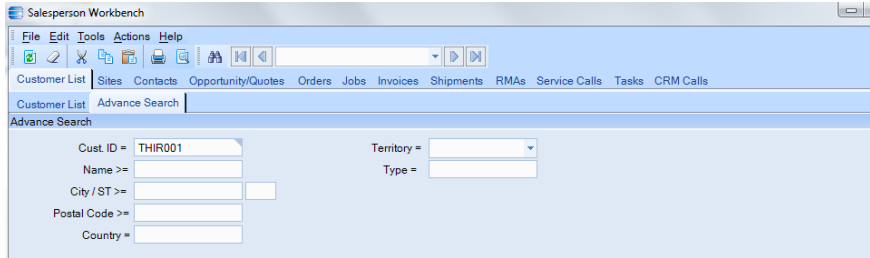Choose **CUSTOMER SEARCH**
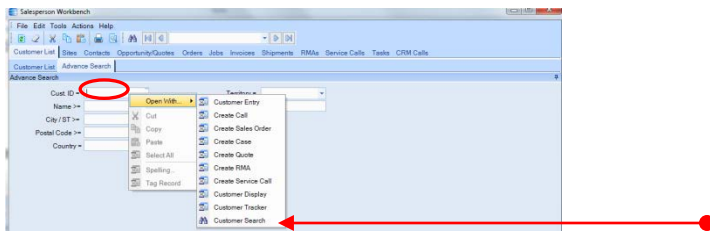
From the **SEARCH RESULT** list,
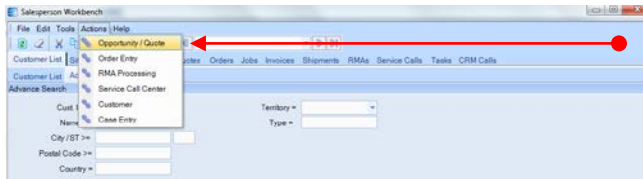Choose the company you wish to quote

Click **OK** button at bottom left

The following screen is generated:
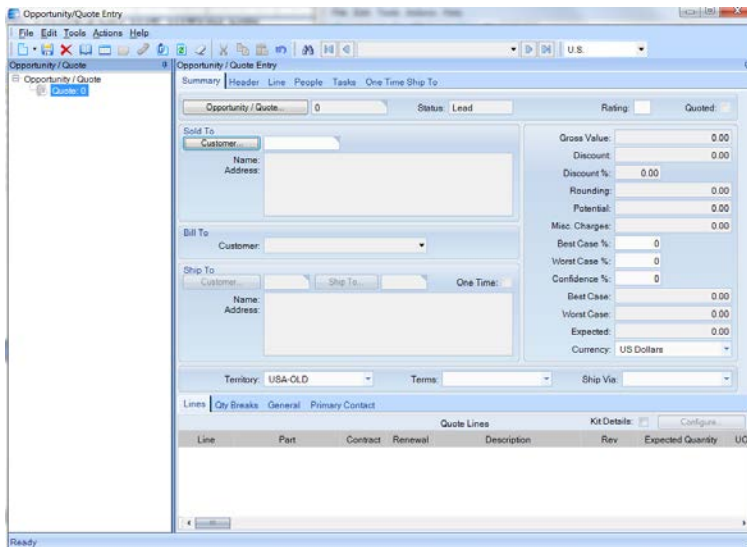
Choose **ACTIONS** on the menu bar

Choose **OPPORTUNITY/QUOTE**

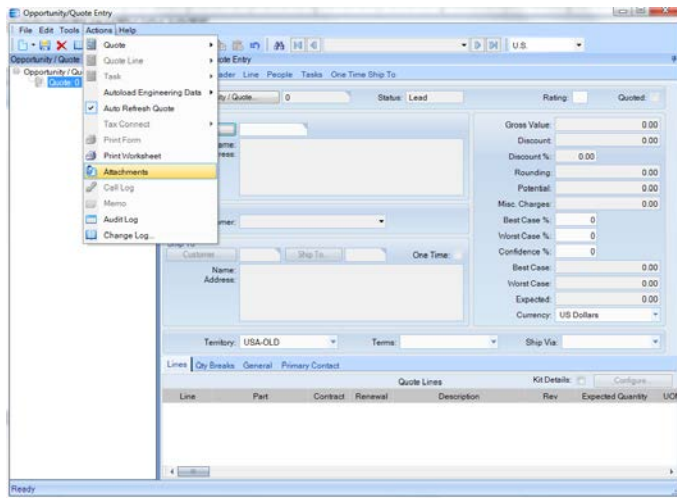Click the **NEW** icon on top of menu (a quote ID is generated)
Identify **CUSTOMER** through a **CUSTOMER SEARCH**
Indicate **TERRITORY**
Enter any values for the quotation (gross value, especially)

Attach the corresponding quotation documents (cost sheet, PDF, emails, etc).

Don't forget to SAVE your quote entry before you exit.