Epicor Eagle Installed Sales

EPICOR

Product

▶ Epicor® Eagle® Installed Sales

Benefits

▶ Simplify and more efficiently manage the entire installed sales process

▶ Save time and ensure accuracy with the Eagle solution's inventory and accounting capabilities

▶ Easily create professional-grade quotes and contracts

▶ Process change orders with ease and accuracy

▶ Simplify complex accounting chores

▶ Gain greater visibility into installed sales margins

It's no surprise that installed sales is gaining popularity among hardware and home center retailers. Yes, they're enormously convenient for customers—but for businesses, the opportunity for growth and profits is substantial.

Installed sales operations come with their own challenges. There are a lot of "moving parts" to track, including installers, materials, and vendors. Quotes and contracts can be complex, as they usually require specific, consistent legal wording and are subject to constant change—even after a job has begun. A range of documents—agreements/contracts, change orders, and many installation-specific legal forms—must all be created, managed, shared, and kept up-to-date.

What's surprising, then, is how many installed sales operations are managed with spreadsheets, word-processing programs, and even paper-based tools—all prone to redundant data entry and the challenges that redundancy presents. Miscommunication and missed details stemming from manual processes create embarrassing slip-ups. This can leave retailers with too many unprofitable jobs or disappointed customers—and no workable way to improve the situation.

An end-to-end solution for complete installed sales management

The new Epicor Eagle Installed Sales solution combines a comprehensive installed sales management software with the point of sale (POS), inventory, and accounting functions of Epicor Eagle software. By enabling you to efficiently manage and track the entire process—from lead tracking, estimating, and contracts all the way to final billing and profitability analysis—the solution can revolutionize your installed sales business. Epicor Eagle Installed Sales software can help you create new revenues from installation services. You'll also save time, avoid errors, and work toward optimizing prices and profits.

The solution starts with powerful installed sales management software from RenoWare®. This easy-to-use, Microsoft® Windows®-based solution automatically accepts ordering data from popular design and integration tools including Luxwood Software Tools® and SaberisConnect®. It then creates professional proposals, contracts, and other legal documents. It's easy to customize document templates that fit your specific business operations and reflect your brand. When a customer accepts a proposal, the solution seamlessly passes relevant materials and labor data to Epicor Eagle. There, records are set up automatically to track inventory, materials purchases, customer invoicing, and more. Powerful RenoWare reporting lets you track jobs in-progress and analyze completed jobs to understand profitability, so you can refine pricing and quoting processes moving forward.

This easy-to-use solution helps you manage vendors, sub-contractors, tasks, and schedules. You can also track and manage commissions, materials, labor margins, cost burdens, and more. When the inevitable changes occur, it's easy to make the adjustments once—in one place—so you maintain tight control of every project.

Take charge of your installed sales operation. With Epicor Eagle Installed Sales, your operation can run more efficiently and profitably—and that's great for your customers and your bottom line.

Key features

Efficiency-boosting tools

▶ Capture all the information you need once with this comprehensive, Windows-based solution—eliminating much of the duplicate data entry you may currently do on spreadsheets, in word-processing tools, on paper forms, and in the Eagle solution

▶ Document and share project-specific installation notes and other information to improve team communication and customer service

▶ Seamlessly integrate the software with a range of popular industry design and estimating tools like Luxwood Software Tools and SaberisConnect, so you can import material lists, then just add labor and other miscellaneous costs to produce quotes

Comprehensive installed sales documents

▶ Easily create customized documents that suit your business

▶ Generate professional-grade quotes, contracts, and other documents with smart templates

▶ Build contracts, installer agreements, work orders, change orders, completion and warranty certificates, satisfaction surveys, service-tracking, and many more documents—all in a PDF format, ready to email

Seamless integration with Eagle POS and accounting functions

▶ Approve quote information and it is automatically passed to the Eagle system, which creates appropriate non-stock SKUs, a customer deposit invoice, and other relevant records

▶ Easily create purchase orders in your Eagle software for doors, windows, or other materials

▶ Automatically pass relevant data for invoicing to your Eagle solution as tasks are completed

Complete installed sales project management

▶ Set up new jobs and proposals quickly and easily with Job Wizard

▶ Keep tight control on change orders with built-in tools

▶ Easily schedule and track project labor and tasks

Extensive reporting keeps you on track

▶ Measure your installed sales success with reports on job (and job type) profitability, estimate vs. actual comparison, gross margin percentages, and more

▶ Manage more effectively with reports on staff productivity, sales, close ratios, unsold proposals, and more

▶ Consolidate data from multiple stores or operations as needed

Personalized marketing tools

▶ Enable sales staff to track leads with CRM tools

▶ Maintain personalized contact with customers and prospects through an easy-to-use marketing program

▶ Easily create compelling postcards that feature completed jobs nearby or promote special offers

Requirements

▶ Epicor Eagle Release 26.1 or higher

▶ Eagle Customer Order Management

▶ Eagle Bill of Materials

▶ Microsoft Windows 7/8/10

▶ 32/64-bit processor, 4GB RAM, 200GB disk storage

▶ Internet access

▶ Microsoft SQL Server® 2012 Express or cloud-based database

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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Contact us for more information on Epicor products and services

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