Introduction to Kinetic for BisTrack

This system is a modern and responsive cloud-based solution that lets you access critical system functionality anywhere you have an internet connection and access to your data.

To help you get the most from using the system, we'll show you how to set it up, navigate it, and walk you through the key functions.

We recommend that you view the topics in the order shown.

Select the first topic to get started.

Topics

- Login
- Layout and Navigation
- Search and Filters
- Attachments and Signatures
- Journey Planner

Login

Follow these steps to login to Kinetic for BisTrack.

Navigate to the Login page. Your system administrator will provide the link.

At the top of the login panel, select the environment that you want to log in to, then enter your BisTrack username and password.

Follow these steps to login to Kinetic for BisTrack.

Navigate to the Login page. Your system administrator will provide the link.

At the top of the login panel, select the environment that you want to log in to, then enter your BisTrack username and password.

The system prompts you to select a computer profile and branch.

Use the drop-down menus for each if you need to make changes.

When finished, select OK.

The system opens the Landing page; yours may look different based on your company's configuration.

That's all there is to logging in!

Occasionally you may need to change the computer profile or branch.

To do this, select the profile icon.

Then select either the branch or computer icon. They both open the computer profile and branch selector.

Use the drop downs to make your selection and choose OK when finished.

You'll see the change reflected at the top right corner of the Landing page.

When you're finished working in the system, select the profile icon, and then select the Logout button.

The system acknowledges that you have logged out of the system.

Layout and Navigation

Now that you're logged in, let's take a closer look at the Landing Page.

Remember, depending on your company's setup, yours might look slightly different.

Notice each of the key elements identified on the Landing page. If you are working in one of the system functions, you can return to this page by selecting the Home button in the upper left corner.

Select the icons for the numbered items to learn more about these Landing Page elements.

When you select a menu item, the system opens the selected page. Depending on your menu selection and device, each page displays appropriate to your selection and device.

Let's take a closer look at the Contacts page. Many of the page elements you see here are applicable to other pages.

This is the pages' Navigation Path. The name of the page you are on is grayed. You can select another page in this path to go to that page. For example, if you clicked the BisTrack link, the system would return you to the landing page.

You can use the Search Criteria field to narrow the page contents to something specific.

This is the Filter Icon. Use it to sort the displayed information.

This is the Add Record button. On some pages, this feature is located on the right side of the screen. Selecting it takes you to a new page where you can enter the information for the record that you want to add. There's usually another link in the same location that takes you back to the previous page.

These are the Column Headings. Depending on the page you're on, you may see clickable links within the column. For example, on the contacts page, links enable you to call or email the contact directly from your device .

Your system searches often return more records than the system can display on one page. The Page Number Navigation tells you how many pages of information your search returned. You can select any of the page numbers, or the blue arrow indicators to move to the information on that page.

The Number of Records indicator tells you how many items are on the page and the total number of items in the section.

You can use the scroll bar or arrow indicators like you do in other computer applications to move the page up or down, and where available, to move the page horizontally.

You can also scroll through records by positioning your cursor over a grid and then using the thumb wheel on your mouse to move the records up or down.

If you're using a mobile device, press and hold the scroll bar to move the records vertically or horizontally.

This is the pages' Navigation Path. The name of the page you are on is grayed. You can select another page in this path to go to that page. For example, if you clicked the BisTrack link, the system would return you to the landing page.

You can use the Search Criteria field to narrow the page contents to something specific.

This is the Filter Icon. Use it to sort the displayed information.

This is the Add Record button. On some pages, this feature is located on the right side of the screen. Selecting it takes you to a new page where you can enter the information for the record that you want to add. There's usually another link in the same location that takes you back to the previous page.

These are the Column Headings. Depending on the page you're on, you may see clickable links within the column. For example, on the contacts page, links enable you to call or email the contact directly from your device.

Your system searches often return more records than the system can display on one page. The Page Number Navigation tells you how many pages of information your search returned. You can select any of the page numbers, or the blue arrow indicators to move to the information on that page.

The Number of Records indicator tells you how many items are on the page and the total number of items in the section.

You can use the scroll bar or arrow indicators like you do in other computer applications to move the page up or down, and where available, to move the page horizontally.

You can also scroll through records by positioning your cursor over a grid and then using the thumb wheel on your mouse to move the records up or down.

If you're using a mobile device, press and hold the scroll bar to move the records vertically or horizontally.

Some pages, like this Quick Order page, display a progress indicator at the top of the page. This gives you a visual reference to where you are in the process.

Some screens give you the option of deleting a line by selecting the Delete icon.

As you complete entries on the page, you can use the navigation buttons to move back and forth between process pages.

You can hide or show record information two ways. One by selecting the Show/Hide arrow icon and the other by selecting the Header name.

When working with pages such as Product Details that have a lot of information in sections, you can easily move between them by selecting the section header. This is analogous to selecting tabs on a web page.

The system underlines the selected header, so you have a visual reference for the selected section.

After performing a search, the system displays the results in a grid, or you may see cards. Whether you see one or the other depends upon the device you are using and the size of the window.

Here's an example of contact information shown first in a grid and with the columns squeezed to the left, eventually the grid changes to cards.

Regardless of how the system displays the information, selecting a record opens the page for that item.

Search and Filters

There are search fields throughout the application where you can find information. They are smart searches. This means that you can type part of what you are searching for in the field and the system retrieves all results that contain that text.

Smart Search fields enable you to type any part of what you are searching for and yield a result.

In this example, typing con (for construction), and then pressing Enter, yields 423 records with the characters con in one of each record's data elements.

Some Smart Search fields respond as you type.

In this example, typing qui in the Search field immediately narrows the list to just those records that contain the specified characters.

You can leave any Smart Search field blank so that when you press Enter, the system returns all records for that function you are in such as customers or products.

A list can have a lot of entries.

You can use filtering to reduce the number of entries in the list and sorting to organize them in different ways.

Select the image to see an example of how filtering works to sort customers by customer code.

Attachments and Signatures

You can add attachments and signatures in many places throughout the system.

For example, you might want to add an agreement document to a customer record or a signature to an order.

When you add an attachment or signature to a document or record, you can access them anywhere that you access the document or record in the system.

Select the Attachments or Signatures images.

When the panel opens, read the explanation on each image and then select the down arrow to view the next step in the process.

Journey Planner

Using Journey Planner helps you schedule and dispatch your products and minimize errors.

You can see all the journeys for each of your vehicles for a selected date, with color codes that let you recognize the status of each journey immediately.

You can add, move, and change those journeys as needed.

Let’s take a closer look.

Journey Planner is available on any PC or mobile device.

However, because of the volume and layout of the information you’re working with, we think you’ll find it works best when viewed on a PC.

Access it from the Menu.

Note that this is a vocabulary-controlled name and may be called something else in your system such as Dispatch and Delivery.

The Calendar panel is where you plan and monitor your vehicle and their journeys to deliver and collect products.

The Documents panel is where you locate documents for delivery or collection to add to your Journey Planner calendar.

In addition to the list of documents, this panel gives you several options.

You can search and filter the documents list and decide where you want to dock the list - on the right side of the screen or at the bottom.

This panel also tells you the number of documents.

You can resize the panels from the center divider to make one panel larger and the other smaller as needed.

Selecting the Gear icon opens the Journey Planner Options panel which gives you the ability to set up your calendar for first day of the week, start and end times, and more.

Color-coding your Saved, In Progress, and Completed journeys is helpful when you want an at-a-glance status update on Journey activity.

The system changes the colors automatically as your deliveries and pickups status changes.

Each panel includes a right click menu.

One for the Calendar Panel.

Another for the Documents Panel.

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, hosted, 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.

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298