

Customizing Your Propello Experience

The home page contains some cool default components, but you can easily customize the layout to align with your preferences. We will show how to make these edits to the home screen including updating your profile information, creating and editing new tabs, and adding widgets.

Topics

- Updating Your Profile
- Customizing Your Home Page

Updating Your Profile

Update your profile by selecting the My Profile button or choose Manage Profile from the drop-down menu by your login name.

On the edit profile page, select the Add Photo link to update your profile photo.

If you already have a photo uploaded, the button will be labeled Change Photo.

You can update your display name, email address, or phone number if needed.

The default store associated with this user is displayed.

Add or change your pin number for easy log in access to point of sale.

The preferences tab lets you be in control of several system behaviors.

Expand the dropdown menu to choose features in specific areas.

Consider customizing these features to improve your workflow.

Opening point of sale with expanded customer and product information in the right side flyout pane.

Set the quick find panel on the right side of POS to default to open if you sell a lot of items that are not scannable. You can always close it when you need to by choosing the arrow icon above the pane in POS.

Using function keys lets you use the keyboard to navigate along with the mouse.

You can hide them in point of sale by enabling the *Hide Function Keys in POS but show on hover in tooltip* preference though you can still see them in a tooltip when you move the cursor over a field that has a function key.

If you are using a touch screen the function keys may not be needed.

If you want to see pages open in grid view instead of form view, enable the *Open Maintenance Pages in Grid View When Available* preference.

Grid view gives you several filters and export functionality.

So, if that if getting that data is part of your role, choose that option.

If you normally add or edit individual items, go with form view.

On the alerts tab, choose the alerts you want to receive and the method to receive them; by email, SMS text, or both.

You can search for an alert or filter them by application.

Use the store drop down menu to select the store that will trigger the alerts.

Use the filter by subscription tabs to show the subscription status of your alerts.

Remember to save your changes.

For more help on updating your profile, select the help icon and type *profile* in the search field.

There are several resources here to guide you.

Customizing Your Home Page

There are a few things you can do to make the home page work for you.

Select the edit icon to add tabs and widgets.

An information popup advises you changes are saved to your Default layout, which is particular to your login.

Anyone else logging into the application can customize it to suit their needs.

You can add a new *tab* to *better organize your home screen*.

Select *New Tab*, give it a name, and choose ok.

Let's add a widget to the tab.

Select *new widget*.

Choose the Website Link widget.

Give the website link a title and enter its web address.

Edit the font and background colors if desired and choose or remove an image.

When finished, select ok.

The *new widget* displays on the *new tab*.

When you have multiple widgets on a page, you can drag and drop them anywhere you like on the screen.

Select the ellipsis icon to edit or delete a widget. Follow the prompts to complete the action.

You can always revert to the *Epicor* home page by selecting the double arrow icons under your login username.

Choose Default to return to your customized screen.

When finished, you have several options: cancel the change, save-and-exit, save, or delete the tab.

Recap

With a few quick changes its easy to customize screens and processes to match your workflow.

In this course, we showed how to update your profile and customize the home page including managing tabs and widgets.

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