

Navigating Propello Software

Whether you're a **manager, point of sale clerk, or purchasing agent**, Propello is designed to make your job easier. This course will identify key 'Home Page' elements, explain typical screen layouts and demonstrate the robust and contextual Help.

Topics

- Using the Home Page
- Navigating Function Pages
- Getting Help

Using the Home Page

The first time you log in, a window displays where you can watch a brief overview video.

You also have buttons to launch a quick tour or open the Help.

This window only appears the first time that you log in, but you can still access the video and tour from the Help menu.

Once logged in, your screen looks something like this. There is a menu panel on the left, topped with a hamburger icon. Selecting the icon hides the panel.

The profile panel displays information about you: the logged-in user. This includes your picture, the store you are logged into, the sales register assigned to this login, and the software version you're using. Clicking the Version link gives you the related upgrade history.

Most panels include a Maximize icon that expands that panel to full screen and hides all other panels. Select the Minimize icon to restore the panel to its original size on the screen.

This panel contains valuable weekly, monthly, and annual sales data. It's the default display until you customize this section. There's also a link to a detailed view of sales dashboards.

This displays an expanded view of the Sales section in the menu panel. Multi location users can choose a specific store.

Dependent on your security permissions, you can customize this panel with additional tabs and widgets.

The 'alerts *icon*' shows how many alerts you have to review and when clicked, opens the 'alerts *viewer*'.

This provides critical information regarding application activity along with the completion or failure of scheduled tasks.

The system administrator typically assigns alerts based on your role. With the right permissions, you can set or edit them too.

The top tool bar is available on all screens. It also shows who is logged into the software along with a link to admin settings and the Help menu.

There are icons to see recently viewed features and to identify favorites.

The up and down double arrows enable you to change from the default home page, which can contain your customizations, or to revert to the Epicor standard home page.

These features are the gateway to all functions in the software.

It includes the menu on the left, profile information, sales information, alerts, and various links that help make it intuitive.

Navigating Function Pages

Let's examine layouts and features on some typical function screens like those you see in sales, products, and customers.

Most of what you see on these screens applies to the other screens in the application.

When we select the Customers in the menu, a submenu displays.

These submenus differ based on the main function selected.

Depending on your preference settings, you may see this table view icon available.

Wherever you see a magnifying glass icon, that this indicates a search function.

There are usually other filters to help refine your results.

Clicking Search fills the table with customers, and you can select one, several or 'all' to perform edits.

You can click the crumb bar to move back to a previous screen or use the browser back button.

The add icon adds a new record and an asterisk that appears next to a field indicates required information.

When you see a question mark icon, you can access a guided learning tour of the page.

Similarly, you may see an "i" icon such as this one on the Reporting – Inventory page.

When you select it, you'll see more information about the associated field.

Getting Help

There are times when you just need a little help to figure out a particular field, process, or procedure.

You can access the main Help panel from *any* screen by selecting the question mark icon.

From here, you can search for, or navigate to, a variety of Help topics.

You can choose from videos, knowledge articles or guided learning flows that take you step by step through a particular process.

This is all right here at your fingertips – no need to log into anything else.

Recap

As you can see, navigation is both easy and intuitive. In this course, we described the log in experience, some home page features, basic page use and the available help options.

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