Logging into the System

Welcome! Most likely you're new to the system and this is one of the first courses you're taking. What's the first step? Logging in.

When you log into the system, you access a suite of applications and tools that help you gather, store, manage, and share information across your company.

This course first shows how you log into the system.

You'll then take a quick look around the Home Page to learn about its main features.

Select an option to get started.

Objectives

- Entering Your User Account
- Take a Look Around

Entering Your User Account

To start, navigate to your Log in screen.

Your company's system administrator created a user account for you. Enter the User Name for your account.

Next create a password. Your company most likely has password requirements, like a minimum length, upper and lowercase letters, numbers, and other things.

After you enter your User Name and Password, tap the Log in button.

The system displays, ready to use. You'll next go on a quick tour of the Home Page.

Take a Look Around

When the system loads in, you'll see the Home Page. Your Home Page might look something like this. Then again, it might not, because you can personalize it to display programs you use most often. You'll learn more about this in another course.

These icons are widgets. Tap them to launch the Customer Tracker, Quote Entry, Job Entry, and other programs from this Quick Launch page.

Key information is over here in the upper right. Your user name, company, and site display.

Over on this side is the toolbar. You'll learn more about this, too. For now, tap the Menu button to see and search for programs.

Tap this icon to display the Help and Support panel. Through this panel you can find help articles, watch short instructional videos, and go on guided learning tours on programs.

Select the Help and support center button for even more information. Take a class at the Epicor Learning Center. Launch EpicCare to contact Support. Go to EpicWeb to locate downloads, get professional services information, and connect with the community.

You can also select About to see the System Version, Company Information, and other things you may need to know.

The last thing we'll look at is the User button. Tap this button to see which company and site you are working in. If you have access to other companies and sites, switch access to them from this panel.

You log out of the system by pressing this icon at the bottom.

That's all we'll look at for now. Other courses explore what you can do on the Home Page, so be sure to check them out.

Recap

Let's review what you learned.

You first learned how to log into the system. You then entered your User Name and set up your Password.

Then you took a brief look around the Home Page. You checked out the widgets, toolbar, help panel resources, and user panel options.

Now that you know how to log in, you can start using the system. And to learn more, you can take many courses on Epicor Learning Center. Keep exploring!

About Epicor

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