Getting Started with the Home Page

Welcome to the Home Page – an easy-to-use dashboard design where you keep your favorite programs, set up quick access to the tools you use most often, find the Help & Support panel at your fingertips, use Data Discovery for managing, accessing, sharing, visualizing, and extracting insights from data, and much more.

Objectives

- Quick Tour - Learn Concepts, terminology, and basic navigation.

- The Menu Bar - Become familiar with Icons that open panels and features for quick access to everything you need.

- Widgets - Create buttons that launch the application and programs you use most often, so you have them at your fingertips. 1

Quick Tour

This is 'a' Home Page . . . and, so is this. You can personalize 'Your' home page extensively, so it may look very different from these. Still, some things are the same on all of them. And much of what you see here is the same in other places, so navigating is consistent and simple.

The Indicator shows your username and the company and site you are looking at.

These boxes or buttons here are links to your favorite programs. You personalize this completely, or you start with one of the provided default layouts.

Each box is a widget. More about widgets in a bit.

These are Tabs. If you want to spread things out, or categorize the things you access, you can add tabs.

Cards, like this Sales Order card, are also added as widgets, which truly make this Home Page a focal point of your workday. You put the data you need to see quickly here on the home page.

And this is the Overflow Menu where you find the tools to personalize your Home Page and access basic options like Edit and Refresh.

The Menu Bar

Body The Menu Bar shows on all pages and applications. Each Button opens a panel to work with, with one exception, Data Discovery. When you launch Data Discovery, it opens as a separate program.

Remember, this menu bar is on every application. No need to go back to the Home Page each time you begin to work on something else.

Select a Button to hear information about that icon. When you finish, tap the arrow to continue.

When you launch the system, the Home Page displays automatically. This Home icon will always bring you back to the Home Page.

Enterprise Search provides embedded search capabilities that span all applications within your system, and it can also extend beyond enterprise data - all in a secure manner.

Menu opens a panel. Here you can browse and select a menu option. You can also type all or part of the menu option you want and names that match your results show below. We will dig deeper into this one in the next section.

Use Favorites to access application shortcuts you choose as your favorites.

Use Recents to access application shortcuts you worked in recently.

Use this button to open Data Discovery which is a Business Intelligence solution. Use this program to explore data and display it through different chart views.

You will see this button if Collaborate is licensed in your environment. Collaborate integrates digital messaging and worker conversations with your data. Use Collaborate to seamlessly communicate with other co-workers on tasks and projects.

This button takes you to Help & Support. It will automatically show results that match your current page. There are Videos, Articles, and Guided learning. Yes, Guided Learning, step-by-step instructions you can watch and read while you complete a task.

Of course, you are NOT limited to just see help for the current page. You can search for anything!

Also, check this box to have an icon show next to each field that you can click on for help specific to that field.

And the Help and support center button takes you to more great features. Such as Epicor Learning Center, EpicCare, EpicWeb, and About. Explore this further in the online help and other courses.

The Alerts button opens a panel showing your Collaborate notifications. And (for Cloud Customers) messages from the Cloud Operations team. A yellow dot next to the icon indicates that you have some alerts you haven't yet read.

Click the User button to change Company, Site, Workstation, and Language. You can also access Keyboard Shortcuts, change your password and Log Out from here.

Widgets

Widgets are the building blocks for your home page. Add the ones you need to launch applications, URL Links, Data Discovery Views, documents, and any programs you use the most.

Use the Overflow Menu and Edit to place widgets on your Home Page.

Remember the Sales Order Card? It is an example of a BAQ Grid.

From here you also Add, Edit or Remove the extra tabs we talked about.

There is another course that is all about Widgets. Check it out.

Recap

We began with a tour where we introduced the concepts and terminology we use for the different parts and navigation, such as icons, buttons, and menus.

Next, we looked at all the icons on the Menu Bar and talked about where they take you and what you use them for.

And we finished with an introduction to Widgets and how you can use them to personalize your system.

So, there you have it, the Home page, and its many features!

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.

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