# Navigating Your Records

Use the main interface to launch system features and applications like Sales Order Entry and Purchase Order Entry.

Then within applications, leverage the interface to navigate to areas within a record. Buttons and menus launch additional functions.

During this course, see how to use these features on the interface.

Begin by reviewing the Menu Bar. This bar displays on all applications and it contains tools for navigating around the system.

Next see how to use pages, cards, and the navigation tree to see different areas within a record.

The course ends by showing features you launch from buttons and overflow menus.

Select an option to learn how to navigate in the system.

## Objectives

- The Menu Bar
- Moving Around Records
- Buttons and Overflow Menus

## The Menu Bar

This is the Home Page, or rather, this is ‘a’ Home Page. You can personalize your home page, so it may look different from this example. But some things are the same.

Both the Home Page, and applications like this one, Sales Order Entry, have this menu bar.

The buttons on the menu bar are always the same. Let’s see what each button does.

Select the Home button to see the Home Page. Depending on the widgets you add to this page, you review information, launch applications, or display websites.

Through Enterprise Search, enter key words and search for records across your database.

Other searches only locate records for a specific application, like orders within Sales Order Entry. But Enterprise Search looks for all records that contain your key words. For example, enter a customer like Addison to find the quotes, sales orders, and invoices linked to Addison.

Tap Menu to open a navigation panel. Use it to expand the menu and find applications, like Transfer Order Entry.

If you know the name of the application, enter it in this Search field to find and launch it.

When you search for applications on the Menu panel, they have a star next to them. Select this star to add the application to your Favorites menu.

When you select this Favorites button, the applications you select display on this panel. Tap a link to launch the Favorite application.

Another way to find applications is by tapping the Recents button. The applications you ran lately appear on this panel. Select an option on this panel to launch it.

Use this button to open Data Discovery. This separate application launches on a different tab in your browser.

Use Data Discovery to see the views and charts you can add as widgets to your Home Page. You can also create widgets in this application.

Some Data Discovery features, like the Discovery IoT widget, require an additional license to use.

Launch Collaborate to communicate with co-workers in your department and the entire company.

Use Collaborate to ask questions, coordinate projects, and track issues. This solution makes it easier to work together and complete tasks.

The Help & Support panel takes you to Videos, Articles, and Guided Learning. Watch videos to see how to do a specific function. Read help articles for detailed documentation on a feature or application. Guided Learning takes you step-by-step through a process while you do it.

When you launch this panel, it displays content for the current application. Use this search field to find information on anything in the document library.

This button goes to the Epicor Learning Center where you can take more courses like this one. You can access EpicCare to enter support tickets to technical support. And you can launch EpicWeb to find downloads, review professional services information, and contact the community.

If you have new alert messages, a yellow dot appears on this button.

When you receive notifications from Collaborate, tap this button to review them. If you run the system in a Cloud environment, you may also see messages from the Cloud Operations team.

Click the User button to see the current Company, Site, Workstation, and Language. If you can access different company, site, and other options, select them on this panel.

To log out of the system, tap this button.

## Moving Around Records

You launch applications from the menu, like ABC Code Maintenance, RMA Tracker, and Part Advisor.

When most applications like Sales Order Entry launch, they show a Landing Page. This page has a grid with records. As you scroll down this grid, more records display on it.

Choose a record. Each record displays on multiple pages, and each page organizes the record data into cards. The Header Detail card is the “Who” of the record, such as the customer who placed the order, the customer contact, phone numbers, and so on.

To collapse the card, click the arrow next to the card name.

Scroll down the page. Several pages have more cards that show the “what” of the record, like Credit Card, Miscellaneous Charges, and Order Totals.

To look at another record, use the Crumb Bar. This bar shows the path that brought you here.

Return to any part of this path. Click Sales Order. Now you are back at the Landing Page.

If you know the sales order you want to look at, enter it in this Sales Order field. That filters the records that display on the Landing Page.

But if you are not sure, tap Search in this field. The Search panel slides on.

Use this panel to target which records you want to see. Filter results by entering values in the Search Type, Sort By, and Starting At fields. You could also specify a customer or a Status.

Select Customer Addison and click OK. The Search Results grid only shows the sales records for Addison.

Select a record and press Ok. Your selected record displays on the page.

Use the Navigation Tree, or Nav Tree, to see another part of this record. Select a node on this tree, like the Line Detail card.

As you select nodes on the Nav Tree, the Hero bar shows where you are within the record.

To see the transactions linked to this record, press the Activity link.

These cards contain transactions linked to the current record. Expand the Invoices card. This sales order has an invoice linked to it.

Like the Landing Page, each card has a filter at the top. If several records are in this grid, use this filter to locate a specific record in the card.

The Nav Tree shows on all pages that have cards.

To hide the Nav Tree, tap this button. Expand it by tapping this button again.

Let’s go back to the Order Detail card. Tap the Details button. Select the order number in the crumb bar.

In the Customer field, hover over the Customer ID and right-click your mouse button.

A context menu displays with links to related applications.

Select an application from this menu, like Customer Entry. This application displays, and you can enter changes to the customer record.

Context menus are on many fields. Use them to launch applications that link to the value in the field.

## Buttons and Overflow Menus

Tap these three dots to display Overflow menus. These menus have options you use often, like Refresh and Delete.

Clear gets rid of data you have not saved yet. This option does not delete data saved to the database.

Each application has different options that display on this menu as well. Select these Print options to generate sales order reports.

Tap outside the Overflow menu to close it.

These buttons next to the Overflow menu launch more functions.

Use the Plus icon to add a record to the current program.

Memos add and store internal notes so that other users can view information specific to the record.

Launch the Change Log to see any changes made to the current record.

Tap this icon to look at the Call Log. If a customer calls or emails a question about the current record, this call entry appears on this panel.

Use the Attachments icon to add a document to the record. You can also edit or delete attachments from this pane.

The system makes it easy to save data. You can always select the Save icon. Sometimes Save is on the Overflow menu as well.

But what if you close the page and forget to save?

The system constantly saves changes to records. When you see the moving blue bar at the top of the application, it means the system is saving data or running other processes.

If you try to close a record with changes you have not saved yet, the system asks if you would like to save before you close it.

## Recap

And that is the end of this course. Let's review what you learned about navigation.

You began by reviewing the features on the Menu Bar. This bar displays on the Home Page and all applications. It has buttons that launch system features.

You next learned how to use pages, cards, and the navigation tree to move around different areas within a record.

The course ended by showing features you launch from buttons and overflow menus.

To keep exploring the system and the interface, take more Foundations courses.

## 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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