Personalizing Applications

Everyone uses the system differently, depending on your company's business and what you do. You might only use a few fields on an application, so hiding fields you do not need makes the application easier to use.

Set up an application's interface the way you like it. Each interface then displays the cards and fields you want.

To begin, learn how to launch the Personalize panel. You then see how to hide cards on an interface.

Next explore hiding fields. These fields no longer display as options.

The course ends by showing how to restore the original interface layout.

Select an option to learn about personalization.

Objectives

- Personalizing Cards
- Personalizing Fields
- Restoring Interfaces

Personalizing Cards

Personalizations link to your account. When you log in, only you can use them. Nobody else sees them.

To access this feature, you must have personalization rights. Your system administrator activates these rights on your user account.

You run the Sales Order Backlog Report using the same options. You generate the report for the current day and it shows order release details. You do not change anything else on the report.

To personalize this report, select the Overflow menu and Personalization.

The Personalize panel slides on.

This report has the Options, Filter, and Advanced cards. Each card displays on this panel as a separate node.

The Sales Order Backlog Report only has three cards, but some applications have more. To find a specific card you want to personalize, enter it within the Search field. This card then displays on this panel.

Each card has a toggle that turns it on or off. You do not want to see the Filter or Advanced cards, so you turn these cards off.

Save the personalization.

The next time you launch the Sales Order Backlog Report, you do not see these cards on the interface.

Personalizing Fields

Hide fields you don't need. Return to the Personalize panel and expand the Options card.

To set the Options card to show its fields when you launch this report, activate the Start expanded check box.

Just like the cards, each field has a toggle. Right now they are all active, and you only want to see a few of them.

Toggle off the Period 3, Print Part Descriptions, Period 2, and Period 4 fields.

Save the personalization.

When you launch this report, the Options card opens and just displays the Period 1, Print, and Print Order Release Details fields.

Restoring Interfaces

The Sales Order Backlog Report now only displays the Options card. When it launches, the Options card expands to show its fields.

To run this report for the current date, select the Dynamic check box. Today displays on the drop-down list. Tap Print Preview and the report generates. Your personalization makes it easier to run this report.

But later you need to see all the cards and fields on this report. To restore the original interface, tap the Overflow menu and select Personalization.

The Personalize panel slides on. Select the Reset to Default link.

The system asks if you want to remove your personalizations. Tap Yes.

You return to the Personalize panel. Tap Save.

The original interface now appears for the Sales Order Backlog Report.

Recap

That's how you personalize applications. Let's review what you learned.

You began by seeing how to launch the Personalize panel. You then hid cards on the Sales Order Backlog Report.

Next you explored hiding fields. These fields no longer displayed as options.

The course ended by showing how to restore the original interface layout.

Keep learning about the system. Take more Foundation courses and review the application help.

About Epicor

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