



PracticalTek

SINCE 1997

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Epicor® Tips & Techniques Course Syllabus

Topics covered in this course...

- Understanding what's in front of you: Modules/Submodules
- Setup/General Operations/Reports
- 'Help' in main menu and in a program
- 'Options' in main menu and in a program
- 'Open With' capability – Quickly navigate to “Like” programs
- Icons and their corresponding functions
- Favorites and Favorites Groups – Autoload / Outside programs / etc.
- Users can personalize their screens by adding/removing columns, fields, etc.
- Efficiency opportunities – How to view/manipulate screens to showcase certain info
- Link 'Attachments' to records within the application
- Document Association – Enable various files types to be used/viewed in Epicor®
- Terminology – Attached list of common terms
- Interfaces – Programs / Trackers / Dashboards / Search Menus
- Tree legends / Corresponding Icons
- 'View' settings
- Memory Cache feature for improved performance
- History toolbar
- Detail vs List sheets – Option such as grouping, sum, etc.
- Memo & Change log use – star burst ICON
- Calculator – Right-click on numerical fields
- Shop warnings and Global alerts – What to activate?
- BPM's
- Transaction logs
- Trackers – Individual “Retrieve” vs Auto Retrieve / 'Links'