5 Easy Ways to Find Answers and Impress Your Team

Deb Amato - Epicor University Content Manager

Before we begin—

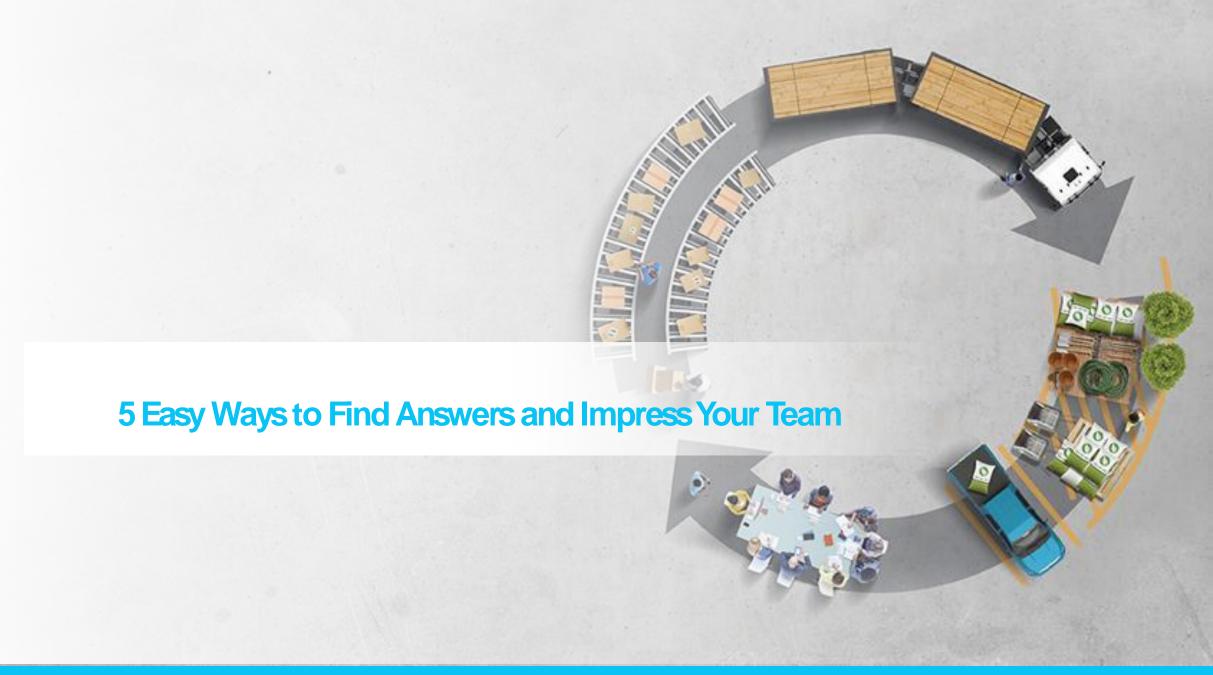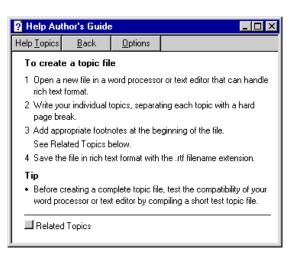You are on mute.

Submit your questions anytime.

We'll send you the replay.

EPICOR.

5 Easy Ways to Find Answers and Impress Your Team

1990　　　　　**2000**　　　　　**2010**　　　　　**2020**

EPICOR.

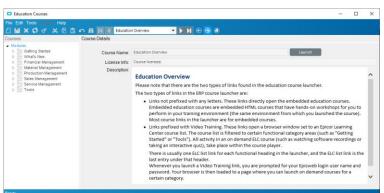# Poll: How do you like to learn?

1. Read articles
2. Watch a video
3. Work through hands-on exercises
4. Trial and Error
5. Learn? I know it all ….

EPICOR.

Help and Support Panel

EPICOR.

Agenda

► Introduction

► The Help and Support Panel

- Videos

- Help Articles

- Guided Learning

- Access to ELC

- Embedded Education
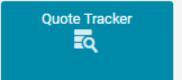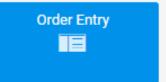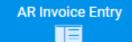
Menu Bar

Help & Support

Epicor Software Corporation

EPICOR.

Epicor

EPICOR.

How can we help you

Search for a solution... 🔍

All | Videos | Articles | Guided

🖥️ **Tour of the Kinetic Home Page**
This guided learning flow takes the user on a tour of the home page.

▶️ **Changing the Workstation in the Kinetic Home Page**
See how to change the workstation you are logged into while using the Active Home Page.

🖥️ **Personalize the Kinetic Home Page**

📄 **Add Programs to Home Page**
You can add Epicor ERP menu items, such as AR Invoice Entry or Customer Maintenance, directly onto the Home Page.

📄 **Home Page**
Use this option to configure the Home Page settings.

We display content based on where you are and what you're doing
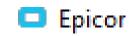
Quote

Quote Tracker

Order Entry

Supplier Tracker

Purchase Order Entry

Purchase Order Tracker

Epicor

EPICOR.

How can we help you

Search for a solution...

All Videos Articles Guided

Tour of the Kinetic Home Page
This guided learning flow takes the user on a tour of the home page.

Changing the Workstation in the Kinetic Home Page
See how to change the workstation you are logged into while using the Active Home Page.

Personalize the Kinetic Home Page

Add Programs to Home Page
You can add Epicor ERP menu items, such as AR Invoice Entry or Customer Maintenance, directly onto the Home

Select the medium you prefer

| Quote Entry | Quote Tracker | Order Entry |

| Supplier Tracker | Purchase Order Entry | Purchase Order Tr |
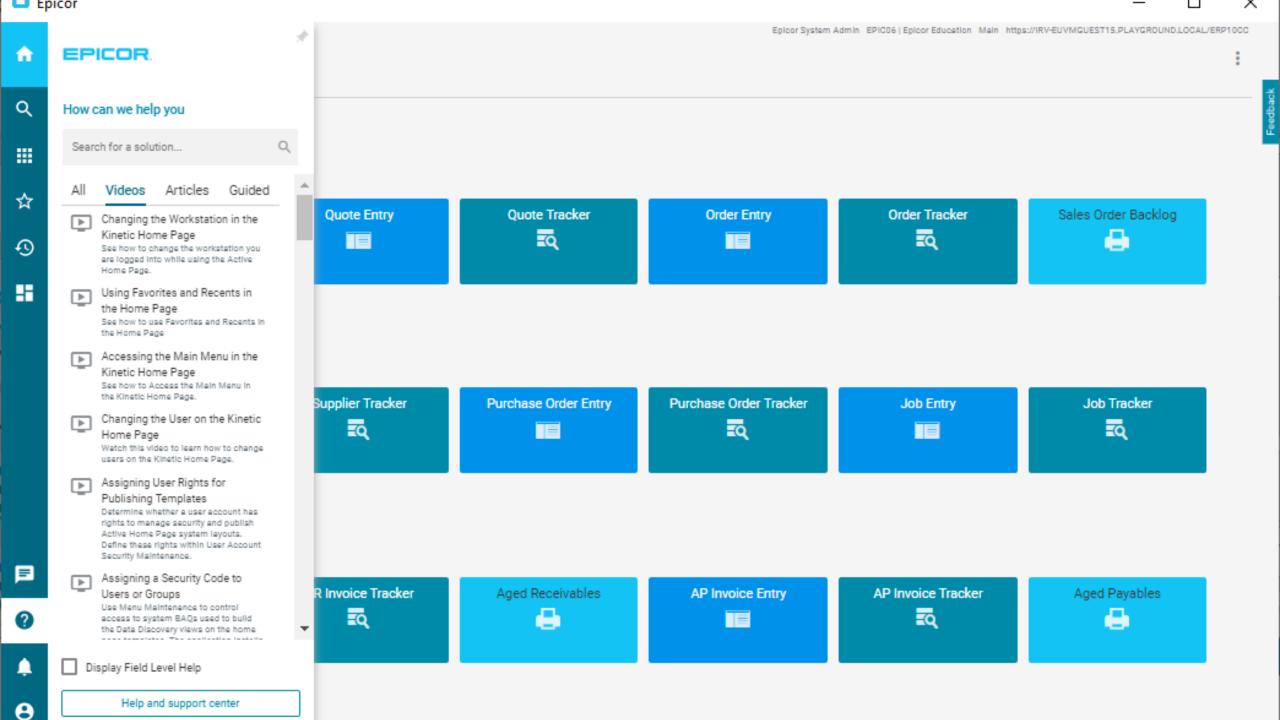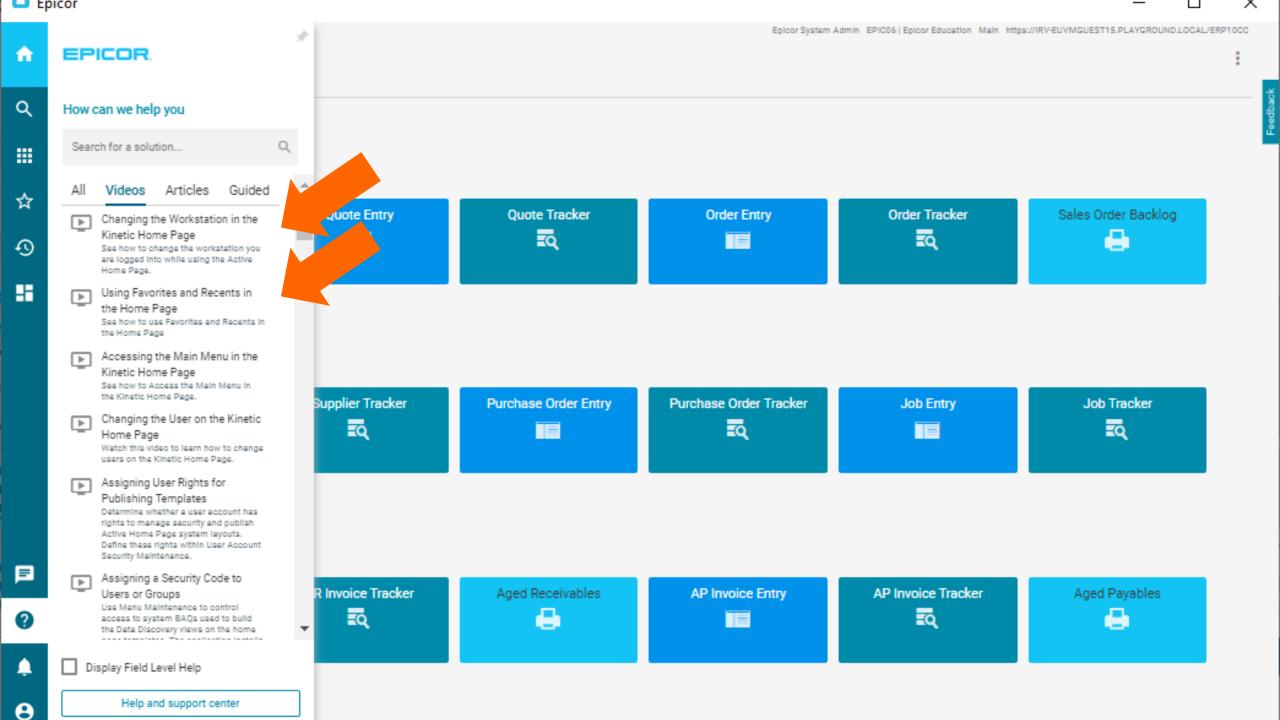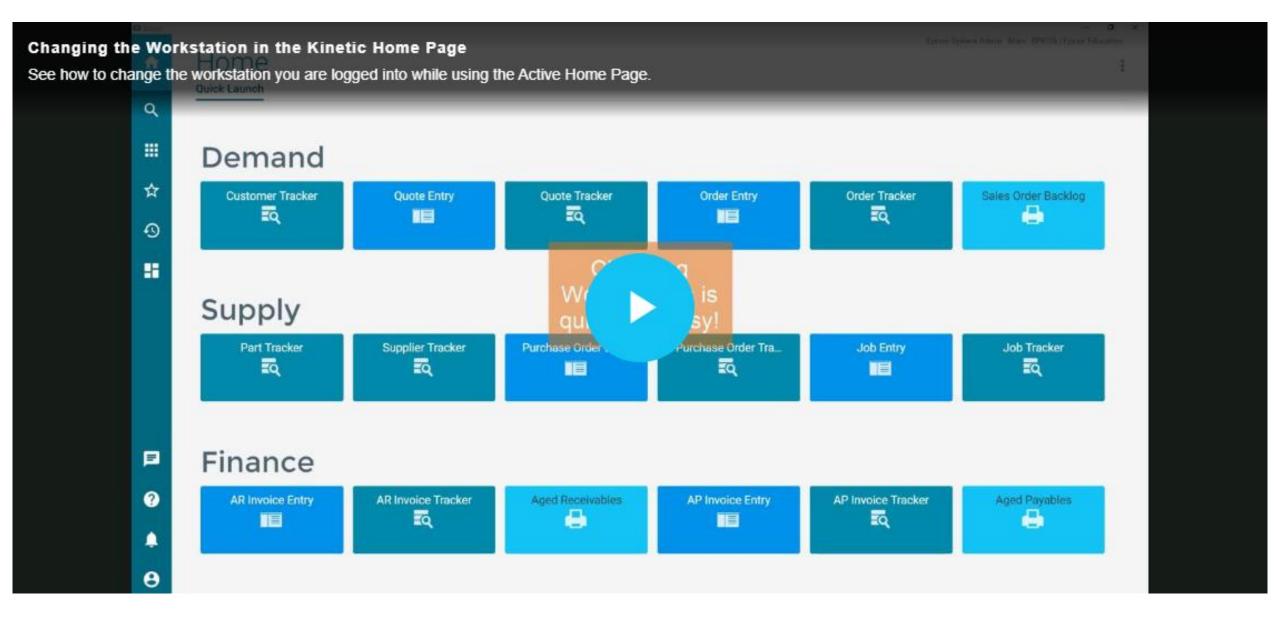
Method 1: Knowledge on Demand

EPICOR.

Epicor

EPICOR

How can we help you

Search for a solution...

All   Videos   Articles   Guided

▶ Changing the Workstation in the Kinetic Home Page
See how to change the workstation you are logged into while using the Active Home Page.

▶ Using Favorites and Recents in the Home Page
See how to use Favorites and Recents in the Home Page

▶ Accessing the Main Menu in the Kinetic Home Page
See how to Access the Main Menu in the Kinetic Home Page.

▶ Changing the User on the Kinetic Home Page
Watch this video to learn how to change users on the Kinetic Home Page.

▶ Assigning User Rights for Publishing Templates
Determine whether a user account has rights to manage security and publish Active Home Page system layouts. Define these rights within User Account Security Maintenance.

▶ Assigning a Security Code to Users or Groups
Use Menu Maintenance to control access to system BAQs used to build the Data Discovery views on the home page templates. The application installs

☐ Display Field Level Help

Help and support center

Quote Entry	Quote Tracker	Order Entry	Order Tracker	Sales Order Backlog

Supplier Tracker	Purchase Order Entry	Purchase Order Tracker	Job Entry	Job Tracker

R Invoice Tracker	Aged Receivables	AP Invoice Entry	AP Invoice Tracker	Aged Payables

Feedback

Knowledge on Demand

Epicor

How can we help you

Search for a solution...

All   **Videos**   **Articles**   **Guided**

Changing the Workstation in the Kinetic Home Page
See how to change the workstation you are logged into while using the Active Home Page.

Using Favorites and Recents in the Home Page
See how to use Favorites and Recents in the Home Page

Accessing the Main Menu in the Kinetic Home Page
See how to Access the Main Menu in the Kinetic Home Page.

Changing the User on the Kinetic Home Page
Watch this video to learn how to change users on the Kinetic Home Page.

Assigning User Rights for Publishing Templates
Determine whether a user account has rights to manage security and publish Active Home Page system layouts. Define these rights within User Account Security Maintenance.

Assigning a Security Code to Users or Groups
Use Menu Maintenance to control access to system BAQs used to build the Data Discovery views on the home page templates. The application installs

☐ Display Field Level Help

Help and support center

Quote Entry	Quote Tracker	Order Entry	Order Tracker	Sales Order Backlog

Supplier Tracker	Purchase Order Entry	Purchase Order Tracker	Job Entry	Job Tracker

R Invoice Tracker	Aged Receivables	AP Invoice Entry	AP Invoice Tracker	Aged Payables

Method 2: Help Articles

EPICOR.

How can we help you

Search for a solution...

All   Videos   **Articles**   Guided

Add Programs to Home Page
You can add Epicor ERP menu items, such as AR Invoice Entry or Customer Maintenance, directly onto the Home Page.

Home Page
Use this option to configure the Home Page settings.

Activation with Modern Home Page
Turn on this mode using the application with the Modern Home Page interface.

Home Page
When you launch Epicor Mobile Access, you are automatically presented with the Home Page.

Personalizing Kinetic Home Page
You can add, resize and group widgets to create a Home Page that reflects your typical use of the Epicor ERP application.In this article, we will cover: Adding widgets Rearranging and resizing widgets...

Home Page Layouts
You can create default Home Page layouts on the Modern Shell Interface.

Explore Home Page
When you launch the application using the Modern Shell menu, you are automatically presented with the Home...

☐ Display Field Level Help

Help and support center

Quote Entry	Quote Tracker	Order Entry	Order Tracker	Sales Order Backlog

Supplier Tracker	Purchase Order Entry	Purchase Order Tracker	Job Entry	Job Tracker

R Invoice Tracker	Aged Receivables	AP Invoice Entry	AP Invoice Tracker	Aged Payables

Feedback

Help Article

EPICOR

EPICOR.

How can we help you

Search for a solution...

All **Videos** **Articles** **Guided**

📄 **Add Programs to Home Page**
You can add Epicor ERP menu items, such as AR Invoice Entry or Customer Maintenance, directly onto the Home Page.

📄 **Home Page**
Use this option to configure the Home Page settings.

📄 **Activation with Modern Home Page**
Turn on this mode using the application with the Modern Home Page interface.

📄 **Home Page**
When you launch Epicor Mobile Access, you are automatically presented with the Home Page.

📄 **Personalizing Kinetic Home Page**
You can add, resize and group widgets to create a Home Page that reflects your typical use of the Epicor ERP application. In this article, we will cover: Adding widgets Rearranging and resizing widgets...

Quote Entry

Quote Tracker

Order Entry

Or

Supplier Tracker

Purchase Order Entry

Purchase Order Tracker

EPICOR

ERP 10.2.600 › Getting Started › Getting Started with Epicor Kinetic

Q Search

Getting Started ⌄

Feature Summary
**Getting Started with
Epicor Kinetic**
Exploring Kinetic Home
Page
Working with
Maintenance
Applications

**Expense Management
Application** ›

Epicor Collaborate ›

**Time Management
Application** ›

Accounts Payable ›

Accounts Receivable ›

Cash Management ›

Customer Relationship ›
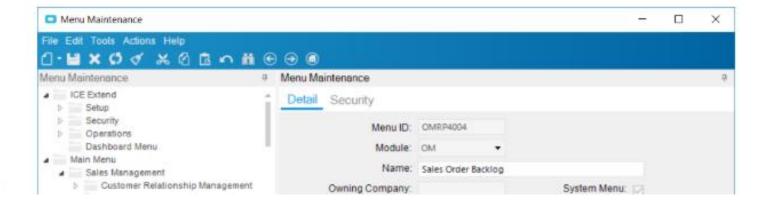
Managing Access to Kinetic Applications

Article last updated: Friday at 18:52

As an administrator (meaning you have either Security Manager or Global Security Manager user rights) you can define Kinetic as the default form that launches for each form and user.

Show me how to set access to Kinetic forms for all users globally ⌄

You can modify the default form type settings in **Menu Maintenance** by changing the value of the **Form to Use** field for a menu item.
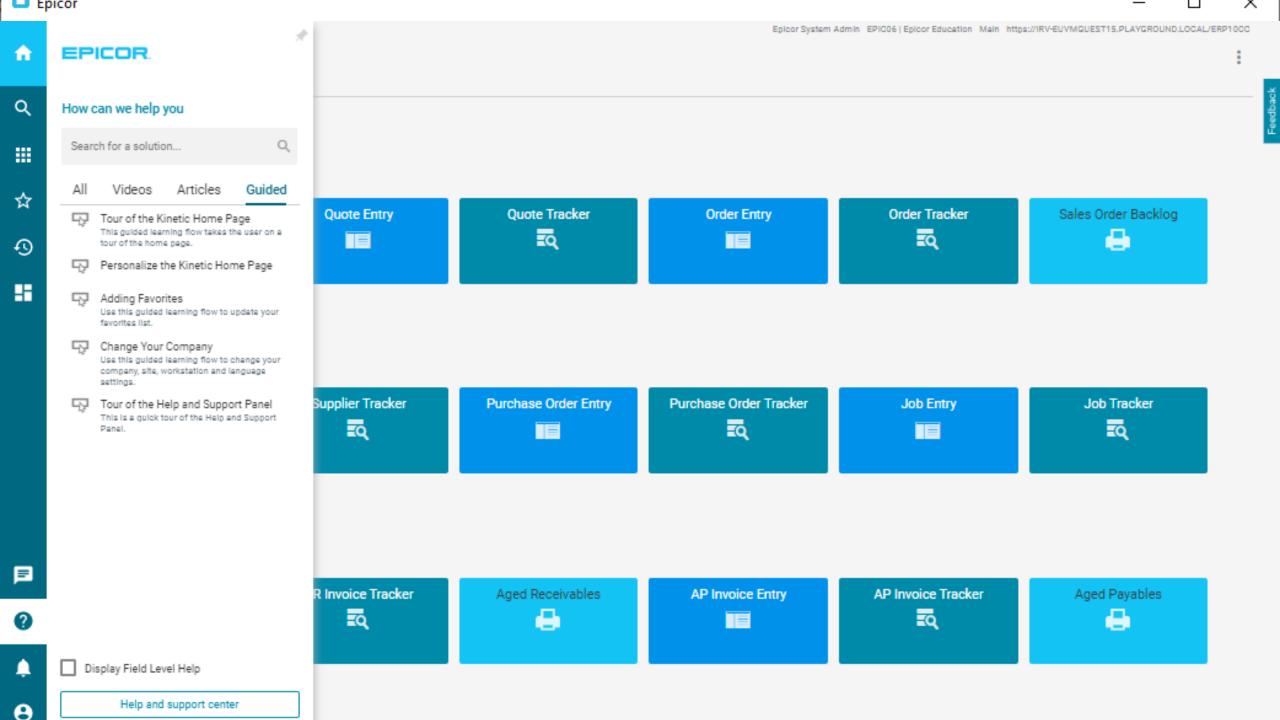
Related Articles

Switching between Classic and Kinetic

EPICOR

Method 3: Guided Learning

EPICOR

How can we help you

Search for a solution...

All   Videos   Articles   **Guided**

Tour of the Kinetic Home Page
This guided learning flow takes the user on a tour of the home page.

Personalize the Kinetic Home Page

Adding Favorites
Use this guided learning flow to update your favorites list.

Change Your Company
Use this guided learning flow to change your company, site, workstation and language settings.

Tour of the Help and Support Panel
This is a quick tour of the Help and Support Panel.

☐ Display Field Level Help

Help and support center

Feedback

Quote Entry	Quote Tracker	Order Entry	Order Tracker	Sales Order Backlog

Supplier Tracker	Purchase Order Entry	Purchase Order Tracker	Job Entry	Job Tracker

R Invoice Tracker	Aged Receivables	AP Invoice Entry	AP Invoice Tracker	Aged Payables

Guided Learning

EPICOR.

Home

Quick Launch

Demand

| Customer Tracker | Quote Entry | Quote Tracker | Order Entry | Order Tracker | Sales Order Backlog |
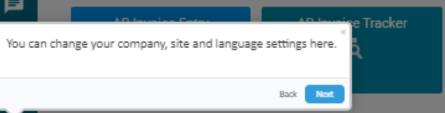
Supply

| Part Tracker | Supplier Tracker | Purchase Order Entry | Purchase Order Tracker | Job Entry | Job Tracker |

Finance

| AP Invoice Entry | AP Invoice Tracker | Aged Receivables | AP Invoice Entry | AP Invoice Tracker | Aged Payables |

You can change your company, site and language settings here.

Back   Next

EPICOR

How can we help you

Search for a solution...

All   Videos   Articles   Guided

Tour of the Kinetic Home Page
This guided learning flow takes the user on a tour of the home page.

Changing the Workstation in the Kinetic Home Page
See how to change the workstation you are logged into while using the Active Home Page.

Personalize the Kinetic Home Page

Add Programs to Home Page
You can add Epicor ERP menu items, such as AR Invoice Entry or Customer Maintenance, directly onto the Home Page.

Home Page
Use this option to configure the Home Page settings.

Kinetic Application Maintenance

...

Menu

▶   Menu (All Companies)

Epic Corporation   ✓

Epicor Distribution   ✓

Epicor Education   ✓

Epicor Europe   ✓

Epicor Financial Co.   ✓

Epicor Mexico   ✓

Epicor Perform   ✓

Epicor USA   ✓

Graphic Printing Co.   ✓

EPICOR

How can we help you

Search for a solution...

All Videos Articles Guided

▶ **Using Kinetic Application Maintenance to Opt In and Opt Out of the Kinetic UI**
Through Kinetic Application Maintenance, you manage when the Kinetic interface becomes available to users. Watch this video to learn how to use this maintenance tool.

▶ **Generating a Kinetic Application from a Classic Dashboard**
Watch this video to learn how to deploy any dashboard built in the Classic interface so that it looks and functions as a Kinetic application.

▶ **Adding a Kinetic Customized Form to a Menu**
After publishing a Kinetic custom application, add it to the menu using the Kinetic interface in Menu Maintenance. This video shows you how you create this Kinetic menu item.

🏷 **Customizing Kinetic Dashboards**

☐ Display Field Level Help

EPICOR

Method 4: Epicor Learning Center

EPICOR.

EPICOR

n Maintenance

···

How can we help you

Search for a solution...

All · Videos · Articles · Guided

▶️ Using Kinetic Application Maintenance to Opt In and Opt Out of the Kinetic UI
Through Kinetic Application Maintenance, you manage when the Kinetic interface becomes available to users. Watch this video to learn how to use this maintenance tool.

▶️ Generating a Kinetic Application from a Classic Dashboard
Watch this video to learn how to deploy any dashboard built in the Classic interface so that it looks and functions as a Kinetic application.

▶️ Adding a Kinetic Customized Form to a Menu
After publishing a Kinetic custom application, add it to the menu using the Kinetic interface in Menu Maintenance. This video shows you how you create this Kinetic menu item.

🏷️ Customizing Kinetic Dashboards

☐ Display Field Level Help

Help and support center

EPICOR.

How can we help you

Search for a solution...

All Videos Articles Guided

Additional Help & Support

▶ Using Kinetic Application
Maintenance to Opt In and Opt
Out of the Kinetic UI
Through Kinetic Application
Maintenance, you manage when the
Kinetic interface becomes available to
users. Watch this video to learn how to
use this maintenance tool.

Epicor Learning Center
Access Epicor Learning Center
(ELC) to access Epicor digital
training. ELC is an online portal
used to drive your Epicor training
program.

Access Epicor Learning Center

▶ Generating a Kinetic Application
from a Classic Dashboard
Watch this video to learn how to deploy
any dashboard built in the Classic
interface so that it looks and functions
as a Kinetic application.

Embedded Education
Use the embedded Epicor
Education for hands-on training in
your Epicor Education training
environment.

Access Embedded Education

▶ Adding a Kinetic Customized
Form to a Menu
After publishing a Kinetic custom
application, add it to the menu using the
Kinetic interface in Menu Maintenance.
This video shows you how you create
this Kinetic menu item.

Epic Care
EpicCare is your technical
support portal for entering
support tickets and making other
requests.

Access Epic Care

Customizing Kinetic Dashboards

Display Field Level Help

Help and support center

Epic Web
EpicWeb is your Epicor research

EPICOR.

183 | ☰ ERP | 👤 Deb Amato | ❓

Home

📁 Course Catalog `<`

📋 Assignments `<`

📚 Certifications `<`

📑 Transcripts `<`

📖 Company Library `<`

🔧 Admin `<`

📋 Super Admin `<`

Epicor Learning Center

Live Training 🔍	My Agendas 🔖	My Certifications 🎓	My Registrations 📅
Search ⊙	**Open ⊙**	**Open ⊙**	**Open ⊙**

📋 My Assignments

Jen - Recording Test 📋
Due Date 06/30/2020

Using Serial Numbers in Epicor ERP 🎥
Due Date 06/27/2020

Understanding Cycle Counting in Epicor ERP 🎥
Due Date 06/27/2020

Understanding Units of Measure in Epicor ERP 🎥
Due Date 06/27/2020

Tracking Lot Numbers in Epicor ERP 🎥
Due Date 06/27/2020

VIEW ALL

⭐ Featured Content

What's New in ERP 10.2.600?

Welcome to Epicor
ERP 10.2.600!

📌 Shortcuts

EpicWeb

📖 Company Library

Epicor ERP 10.2.200 Customer Anno...

https://erpcustomer.epicor.com/lms/certifications/achieved

EPICOR

Home

Course Catalog ⌄

> Browse
> Course Listing / Search
> My Registrations
> Quick Views ⟨
> Cancellation and Substitution …

Assignments ⟨

Certifications ⟨

Transcripts ⟨

Company Library ⟨

Admin ⟨

Super Admin ⟨

Browse Catalog View All Course Information and Access Training

Click a folder name to access the subcategories in that folder. The number in parentheses () indicates the number of available courses in that category
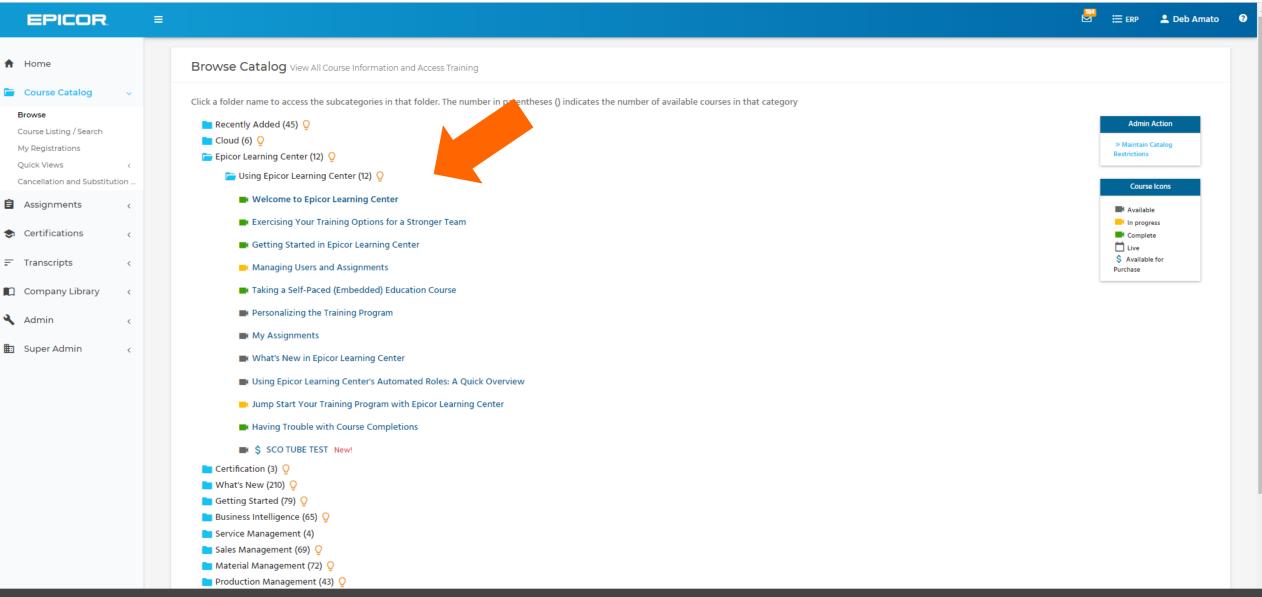
📁 Recently Added (39) ♀

   📁 Recently Added (39) ♀

      📹 **Using Collaborate for Daily Tasks** New!

      📹 **Using Maps and Image Overlays in Epicor Data Discovery** New!

      📹 **Share Your Certification!** New!

      📹 **All About Cloud Strategy** New!

      🟨 **Cloud Definitions** New!

      📹 **Financial Considerations in a Cloud Strategy** New!

      🟩 **Introduction to the Cloud** New!

      📹 **Understanding Channel Partnerships** New!

      📹 **Understanding ISV Partnerships** New!

      📹 **Checking Document Versions In and Out** New!

      📹 **Customizing a Read-Only Guest Account's Settings** New!

      📹 **Processing Non-Standard Invoices with Karmak AP** New!

      📹 **Rolling Back and Promoting Document Versions** New!

Admin Action
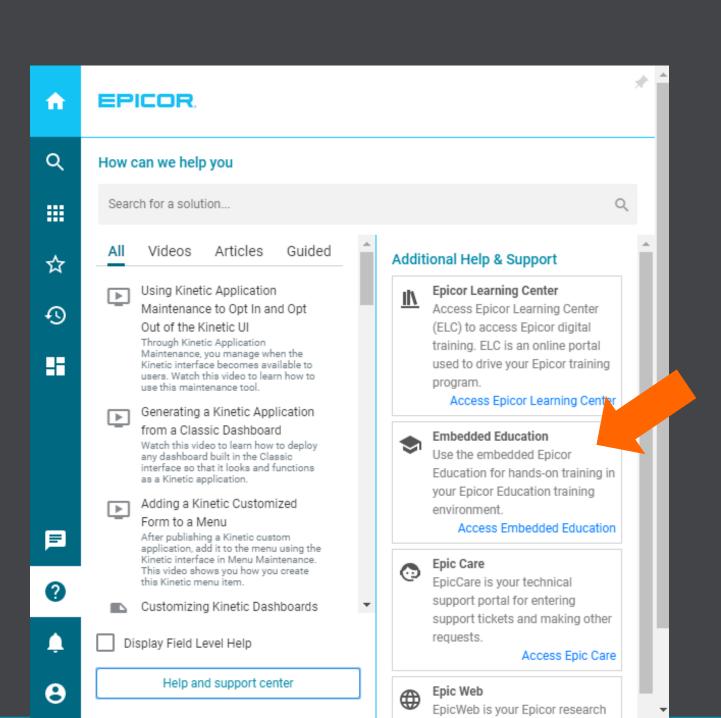
» Maintain Catalog Restrictions

Course Icons

📹 Available
🟨 In progress
🟩 Complete
📅 Live
$ Available for Purchase

EPICOR

☰ | 👤 ERP | 👤 Deb Amato | ❓

Browse Catalog View All Course Information and Access Training

Home

📁 **Course Catalog** ⌄

   Browse

   Course Listing / Search

   My Registrations

   Quick Views ‹

   Cancellation and Substitution ...

📋 **Assignments** ‹

🎓 **Certifications** ‹

☰ **Transcripts** ‹

📖 **Company Library** ‹

🔧 **Admin** ‹

🏢 **Super Admin** ‹

Click a folder name to access the subcategories in that folder. The number in parentheses () indicates the number of available courses in that category

📁 Recently Added (45) 💡

📁 Cloud (6) 💡

📁 Epicor Learning Center (12) 💡

   📁 Using Epicor Learning Center (12) 💡

     🎥 Welcome to Epicor Learning Center

     🎥 Exercising Your Training Options for a Stronger Team

     🎥 Getting Started in Epicor Learning Center

     🟨 Managing Users and Assignments

     🎥 Taking a Self-Paced (Embedded) Education Course

     🎥 Personalizing the Training Program

     🎥 My Assignments

     🎥 What's New in Epicor Learning Center

     🎥 Using Epicor Learning Center's Automated Roles: A Quick Overview

     🟨 Jump Start Your Training Program with Epicor Learning Center

     🎥 Having Trouble with Course Completions

     🎥 $ SCO TUBE TEST New!

📁 Certification (3) 💡

📁 What's New (210) 💡

📁 Getting Started (79) 💡

📁 Business Intelligence (65) 💡

📁 Service Management (4)

📁 Sales Management (69) 💡

📁 Material Management (72) 💡

📁 Production Management (43) 💡

Admin Action

» Maintain Catalog Restrictions

Course Icons

🎥 Available
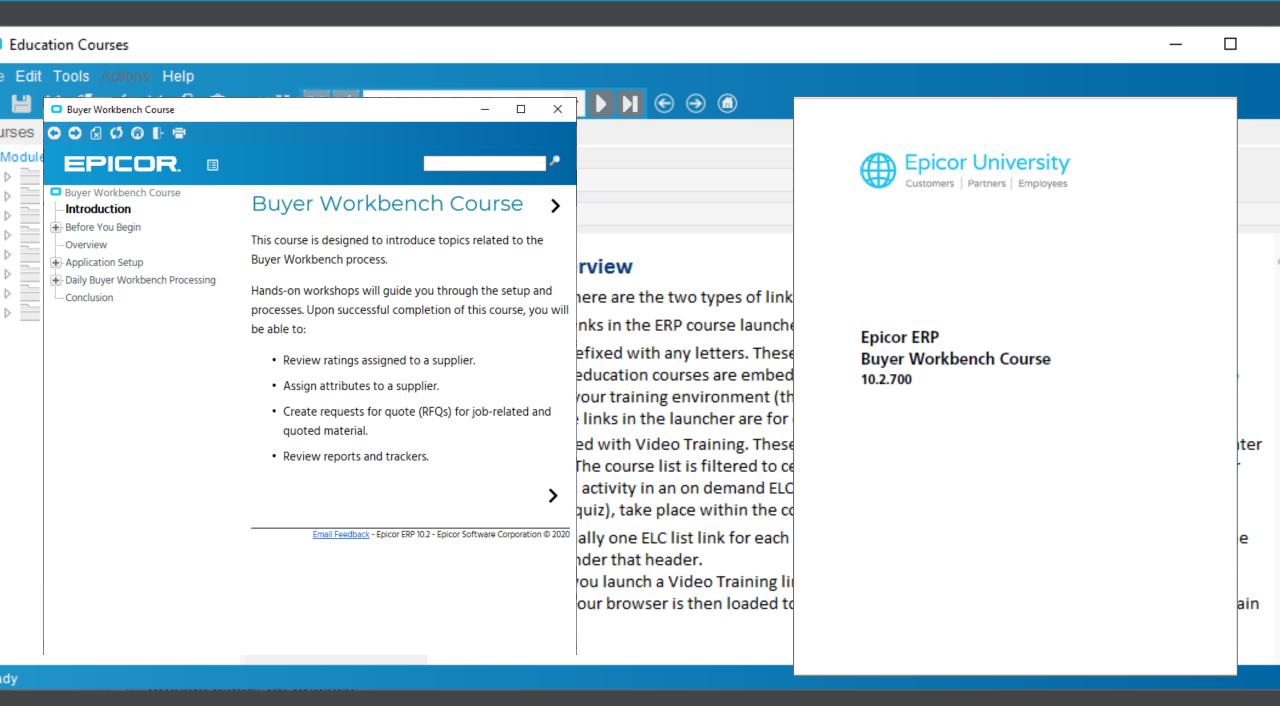🟨 In progress
🎥 Complete
📅 Live
$ Available for Purchase

Method 5: Embedded Education

EPICOR.

How can we help you

Search for a solution... 🔍

All   Videos   Articles   Guided

▶️ **Using Kinetic Application Maintenance to Opt In and Opt Out of the Kinetic UI**
Through Kinetic Application Maintenance, you manage when the Kinetic interface becomes available to users. Watch this video to learn how to use this maintenance tool.

▶️ **Generating a Kinetic Application from a Classic Dashboard**
Watch this video to learn how to deploy any dashboard built in the Classic interface so that it looks and functions as a Kinetic application.

▶️ **Adding a Kinetic Customized Form to a Menu**
After publishing a Kinetic custom application, add it to the menu using the Kinetic interface in Menu Maintenance. This video shows you how you create this Kinetic menu item.

🏷️ **Customizing Kinetic Dashboards**

☐ Display Field Level Help

[**Help and support center**]

Additional Help & Support

📚 **Epicor Learning Center**
Access Epicor Learning Center (ELC) to access Epicor digital training. ELC is an online portal used to drive your Epicor training program.
Access Epicor Learning Center

🎓 **Embedded Education**
Use the embedded Epicor Education for hands-on training in your Epicor Education training environment.
Access Embedded Education

🤖 **Epic Care**
EpicCare is your technical support portal for entering support tickets and making other requests.
Access Epic Care

🌐 **Epic Web**
EpicWeb is your Epicor research

Buyer Workbench Course

EPICOR.

Buyer Workbench Course

- Introduction
- Before You Begin
- Overview
- Application Setup
- Daily Buyer Workbench Processing
- Conclusion

Buyer Workbench Course ›

This course is designed to introduce topics related to the Buyer Workbench process.

Hands-on workshops will guide you through the setup and processes. Upon successful completion of this course, you will be able to:

- Review ratings assigned to a supplier.
- Assign attributes to a supplier.
- Create requests for quote (RFQs) for job-related and quoted material.
- Review reports and trackers.

›

Epicor University

Customers | Partners | Employees

Epicor ERP
Buyer Workbench Course
10.2.700

rview

here are the two types of link

nks in the ERP course launche

efixed with any letters. These

education courses are embed

your training environment (th

e links in the launcher are for

ed with Video Training. These

The course list is filtered to ce

activity in an on demand ELC

quiz), take place within the co

ally one ELC list link for each

nder that header.

ou launch a Video Training li

our browser is then loaded to

One More . . .

EPICOR

How can we help you

Search for a solution...

All   Videos   Articles   Guided

Tour of the Kinetic Home Page
This guided learning flow takes the user on a tour of the home page.

Changing the Workstation in the Kinetic Home Page
See how to change the workstation you are logged into while using the Active Home Page.

Personalize the Kinetic Home Page

Add Programs to Home Page
You can add Epicor ERP menu items, such as AR Invoice Entry or Customer Maintenance, directly onto the Home Page.

Home Page
Use this option to configure the Home Page settings.

Activation with Modern Home Page
Turn on this mode using the application with the Modern Home Page interface.

Home Page
When you launch Epicor Mobile Access, you are automatically presented with the Home Page.

Personalizing Kinetic Home Page
You can add, resize and group widgets

☐ Display Field Level Help

Help and support center

Additional Help & Support

Epicor Learning Center
Access Epicor Learning Center (ELC) to access Epicor digital training. ELC is an online portal used to drive your Epicor training program.
Access Epicor Learning Center

Embedded Education
Use the embedded Epicor Education for hands-on training in your Epicor Education training environment.
Access Embedded Education

Epic Care
EpicCare is your technical support portal for entering support tickets and making other requests.
Access Epic Care

Epic Web
EpicWeb is your Epicor research portal where you can find downloads, professional services information and community offerings.
Access Epic Web

About
Displays version, license and other system information about your Epicor product.

Order Entry

Order Tracker

Sales Order Backlog

Purchase Order Tracker

Job Entry

Job Tracker

AP Invoice Entry

AP Invoice Tracker

Aged Payables

Feedback

Questions?

EPICOR.

Thank you!

EPICOR.