THINGS YOU DIDN'T KNOW ABOUT P21

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DISCLAIMER

- This conference is an attempt by P21WWUG members to assist each other by demonstrating ways that we utilize the Prophet21 system and other related products.

- The P21WWUG and the individuals conducting the classes and round tables take no responsibility for potential issues that arise as a result of taking the advice given during the conference.

- The P21WWUG does not recommend using any SQL statements to update your database without having those statements first reviewed by Epicor or other experienced SQL professionals. Test any code in your Play Database!

- Using SQL statements to update your database may result in corrupting your database. Test any code in your Play Database!

ACCOUNTING

- **Automatic Credit Hold**

- This feature will automatically place a customer on hold if they are over a set number of days past due

- You can set the number of days in system settings and override by customer in customer maintenance

➢ System Settings ->Accounts Receivable -> General -> Days Overdue for Credit Hold

➢ Customer Maintenance -> Billing Tab -> Days Overdue for Credit Hold

ACCOUNTING

- **Reconcile Disbursements through imports**

- Allows you to clear AP checks by using a file from the bank

➢ Bank File Maintenance

ORDER ENTRY

- **Export/Import Job Contracts**

- Setup -> Imports/Exports -> Export ->Order Processing -> Job/Contract Pricing

- Setup -> Imports/Exports -> Import ->Order Processing -> Job/Contract Pricing

ORDER ENTRY

Create Customer Part Number in OE

- This feature allows you to create customer part numbers in order entry without having to go to the Customer Part Number Maintenance window.

- Must be enabled in user maintenance

➢User Maintenance -> Add Customer Part Number in OE

➢Order Entry -> RMB on order line -> Create Customer Part Number

ORDER ENTRY

- **Previous Request**

- Allows you to add items to an order that have been previously ordered by that customer (or by any other set of filters)

➢ In Order Entry -> populate the header -> RMB on item id field -> select "Previous Request" -> add quantity on some items -> click "OK"

• **Insert and Delete Lines in OE**

ORDER ENTRY

• This feature lets you add items into the middle of an existing order as well as permanently remove items from an order

➢Order Entry -> RMB on order line -> Insert Line

➢Order Entry -> RMB on order line -> Delete Line

ORDER ENTRY

- **Panels in Order Entry**

- This feature lets you show extended info for order lines without having to go to the extended info tab

➢Order Entry -> RMB on order line -> Switch to Panel -> Ext Info

ORDER ENTRY

- **Add multiple items at once in order entry item search**

➢ Inside of order or quote, open item search -> enter search criteria -> enter quantities for multiple items -> click ok

PURCHASING

- **PO Default Delivery Method**

- This feature allows you to set the default delivery method for purchase orders

➢Supplier Maintenance -> Purchase Tab -> PO Default Delivery Method

PURCHASING

- **PO Approval Threshold**

- This feature allows you to set the maximum value for a PO to be entered before the PO gets automatically marked as unapproved.

- Thresholds are set in user maintenance

Create New Tabs Using Portals

SYSTEM WIDE

- This feature allows you to create new tabs based on existing portals.
- This feature primarily requires an add-on from Epicor
- Feature must be turned on in user maintenance for the user creating new tabs

➢User Maintenance -> Application Security -> Allow creation of user-defined tabs

ITEM SETUP

- **Pricing Services**

- Pricing Services is used to update most of the fields available in item maintenance in large scale through tab delimited text files.

- Just like most other fields from Item Maintenance, you can update user defined fields through pricing services.

- Change Item IDs quickly for a large number of items

- Uses the windows Layout Maintenance and Build/Update Items.

ITEM SETUP

- **Item Master Inquiry**

- Starting in 2018.2 you can now change item id you are reviewing in any tab of IMI (item master inquiry)

SYSTEM WIDE

- ## **P21 Shortcuts**

- F6 will move from header to line sections and back

- Alt + D will bring up the sidebar to start searching for a specific window

- There are many shortcut keys. Lists can be found on the user group website

- WARNING: Some shortcuts will be different when moving to the web interface

SYSTEM WIDE

- **Dynachange Navigator**

- This feature allows you to create drill downs for fields that you can direct to windows of your choosing.

- Must be enabled in user maintenance for the person creating the drill downs

SYSTEM WIDE

- **Dynachange Admin**

- Starting in 2018.2, you can set any user as a dynachange admin. This allows a user to be able to make screen/menu/tab changes without having to login as the user "admin"

SYSTEM WIDE

- **Display Update Was Successful Message**

➢Tools Menu -> Options -> Display Notifications

➢User Maintenance -> Application Security

SYSTEM WIDE

- **Default new search to start with/contains and only search bold columns**

➢System Setting -> System Setup -> Searching

➢2017.2

SYSTEM WIDE

- **Screen Only Columns**

- Used with business rules
- You can create a screen only checkbox in the opening tab of order entry, then apply a rule that when the screen only checkbox is checked/unchecked then a checkbox on the front counter (print options) tab is checked/unchecked

SYSTEM WIDE

- **Don't open Portals at startup**

- View Menu -> Open Portal View on Startup

SYS ADMIN

- **Set transaction number counters**

- Each type of transaction can start with a different number.
- Example: orders start with 1, pick tickets start with 3.

SYS ADMIN

- **SQL Job to copy production database to play database**

- Using SQL Management Studio, you can create a SQL job that will take the live database and restore it over the play database

- This SQL job can alter the database to show the appearance of being a play database.

- Change company/branch/location name

- Turn off Email, Credit Cards, Alerts...

SYS ADMIN

- **Change text shown in history panel**

- Warning: Fully test any SQL in a play database before running code like this in a live database.
- The text that shows in the history panel of P21 comes from the title_expression field in the frame_menu table.

SYS ADMIN

- **Email Log**
  - This feature lets user see a list of emails that have been sent from P21
  - Useful in tracking what transactions have been emailed and who the email went to

  ➢ System Administration -> System -> Email Log

  ➢ New to 12.17 table output_audit_trail

SYS ADMIN

- **Output File Backup Options**
  - This features lets you keep a copy of the files created when printing crystal forms.

➢System Settings -> System Setup -> Printing

SYS ADMIN

- **Archiving Transactions**
  - This features lets you move transactions from the live database to an archive database

➢ System Settings -> System Setup -> Archiving

➢ Setup Area -> System Administration -> System -> Transaction Deletion

SYS ADMIN

- **Dynachange Caching**

➢System Settings -> System Setup -> Interface -> Enable Dynachange Window Caching

SYS ADMIN

- **Microsoft .Net Framework 3.5**

- We have recently had a number of people contact us after updating to P21 2019.1 with error message when opening P21. Each time this has come up, we found that Microsoft .Net Framework 3.5 was missing from the computer.

SYS ADMIN

- **P21 Web Interface**

- The web interface has been available for a view versions and is getting better with each version.
- It is not as scary to install as you might think
- You can have users running the web interface and desktop interface at the same time
- If you install the web interface, you can choose to use it for just a few features such as the Mass Updates

SYS ADMIN

- **P21 APIs**

- Add on that can be purchased from Epicor.
- Allows you to run many P21 processes outside the p21 application.
- Examples
  - Create Sales Orders
  - Make Bin Adjustments
  - Add locations to items

SYS ADMIN

- **System Power Settings**

- Windows Control Panel -> Power Options -> High Performance

SYS ADMIN

- **Windows Taskbar Icon Grouping**

- RMB on windows taskbar -> Properties -> Taskbar buttons -> Never Combine