

Summary

The cockpit is an easy to use tool that allows you to easily access commonly used functions, see open items as well as add certain widgets to your main screen.

Step-by-step guide

Note: Your links can sometimes become invalid (it will show up with a circle and a red stripe going through it) because of upgrades or changes that alter the link on your cockpit home screen). In these cases, you just need to drag the existing icon off your cockpit into a blank white area, which removes it. Then you can find the link again in the menu and drag it back in. This will re-establish the shortcut with the proper link.

Enabling:

- 1. To enable the cockpit, go to Administration->System Initialization->General Settings
- 2. Switch to the Cockpit tab
- 3. Check Enable Cockpit at Company Level
- 4. Click Update and it will advise you to restart the program.





5. After restart, you have to enable it in a second area in the menu bars under Tools->Cockpit->Enable My Cockpit. It will prompt you for one more restart to finish the process.

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Customization:

- 1. Your new screen should have a My Cockpit tab
- 2. The menus before the Widget Gallery shows you different profiles you have, some of them such as Sales will have predetermined functions and options
- 3. The Home profile will allow you to customize it from scratch
- 4. If you drag the Widgets to the main part of the screen, it will show a new window with that widget
- 5. Switching to the modules tab will allow you to drag in certain menus onto widget





	Welcome, manager. You are in the Home cockpit of OBeerTraining.							
Administration								
Financials 5								
E Sales Opport unties								
Sale A/R	Les Common Functions							
1 Sales Blanket Agreement	💽 Choose Company 📑 Add-On Manager 📓 Scheduler 📓 PdO Creation Wizard 📓 Brew Sheet Data	Cellar Worksheet						
Sales Quotation	MRP Witard							
Sales Order								
Delivery	The second se							
🗖 Return								
A/R Down Payment Invoice								
A/R Invoice								
A/R Invoice + Payment								
A/R Credit Memo								
A/R Reserve Invoice	Conen Documents							
Document Generation Wizard	- Open Documents							
Recurring Transactions	Sales Orders III A/R Invoices							
Recurring Transaction Templates								
Document Printing								
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Purchasing - A/P								
Business Partners								

After you get used to using the system, you'll know which options and menus you use the most and you can customize your Cockpit as necessary.

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