Contents

Purpose

This business process will outline the process for changing the layout and options of the tree display in the Epicor ERP system. In our working example in this document we are changing the tree view in the Engineering Workbench, but the process is the same in all the windows where there is a tree view.

Navigate to Tree Options

Right click on one of the headings in the tree view and select the Tree Options
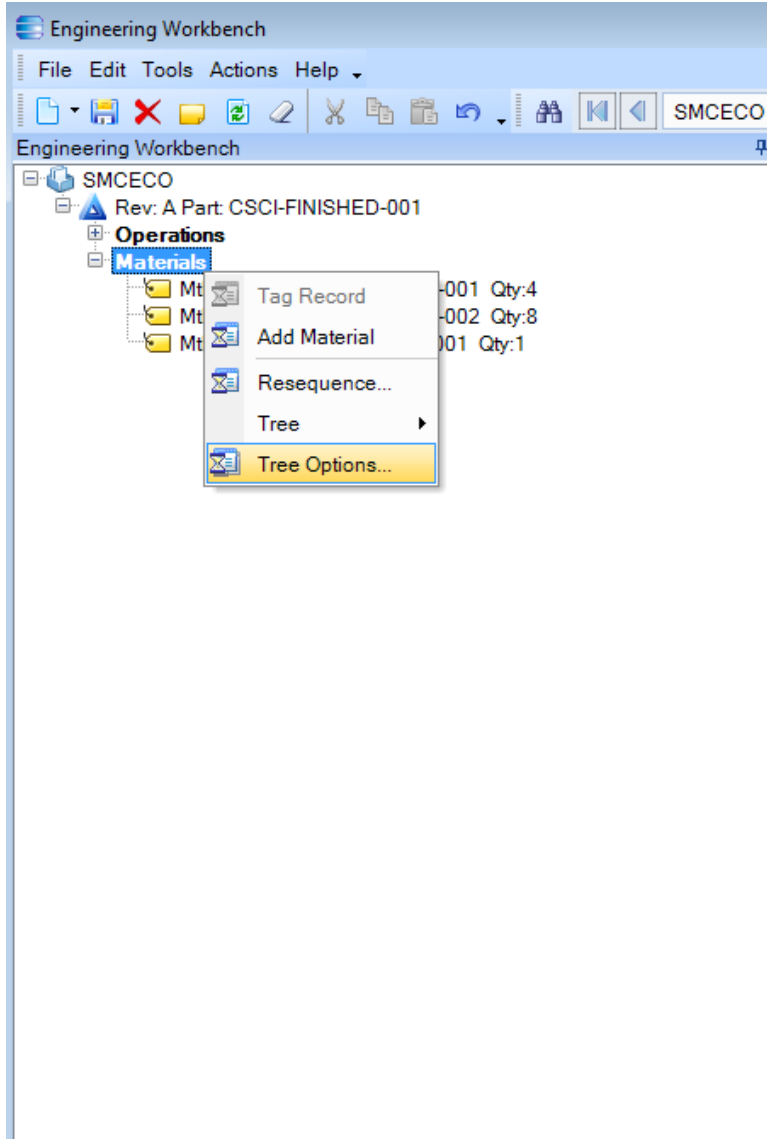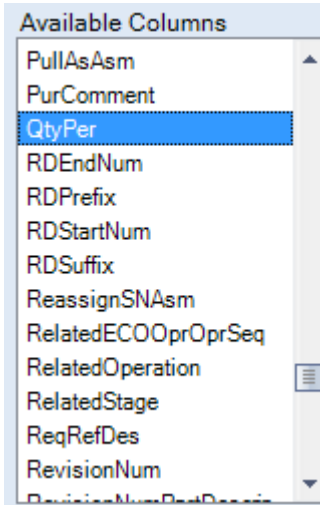
Tree Line to Update
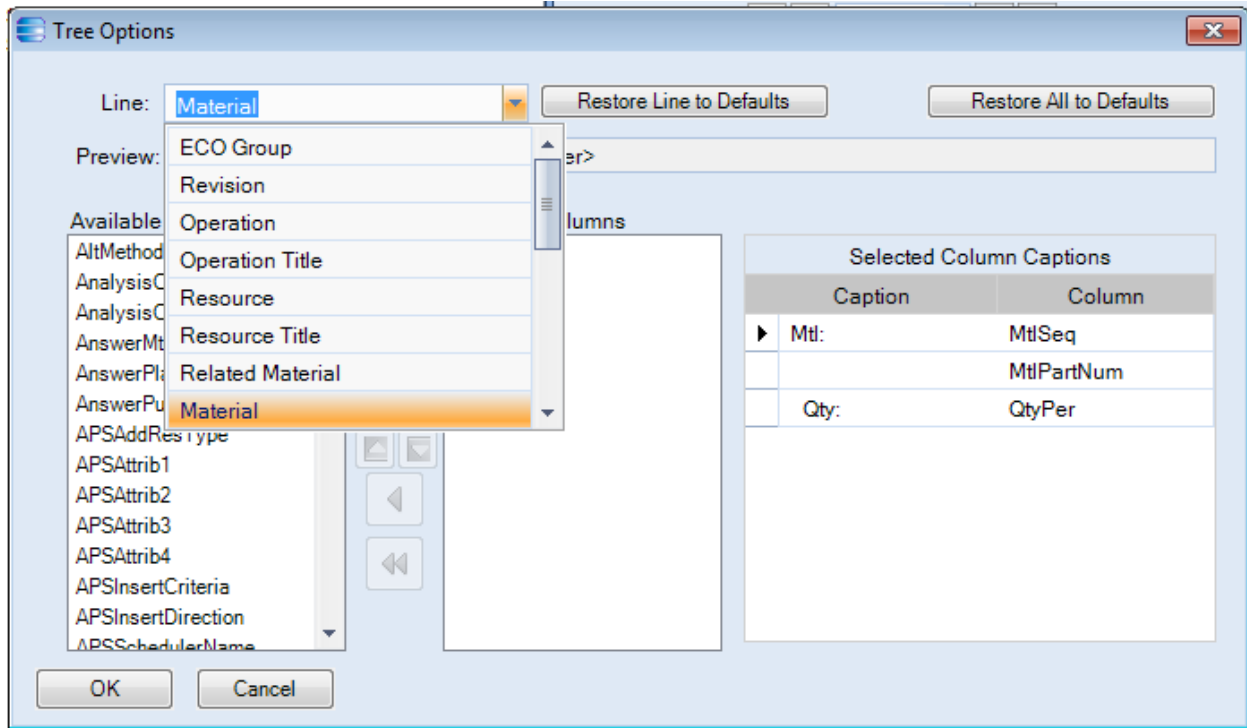
Select the line of the tree that you want to change, in our example we are changing the Material line.

Business Process Procedure - Tree Display Changes

Add a Field to the Line Display

In the Available Columns section of the popup window, scroll through the available fields to review what is available and find what you would like to add to the tree line.

Select the field(s) that you want to add to the line display, in our example we are adding the quantity per component, and click on the [▷] arrow to move the field to the selected columns section.
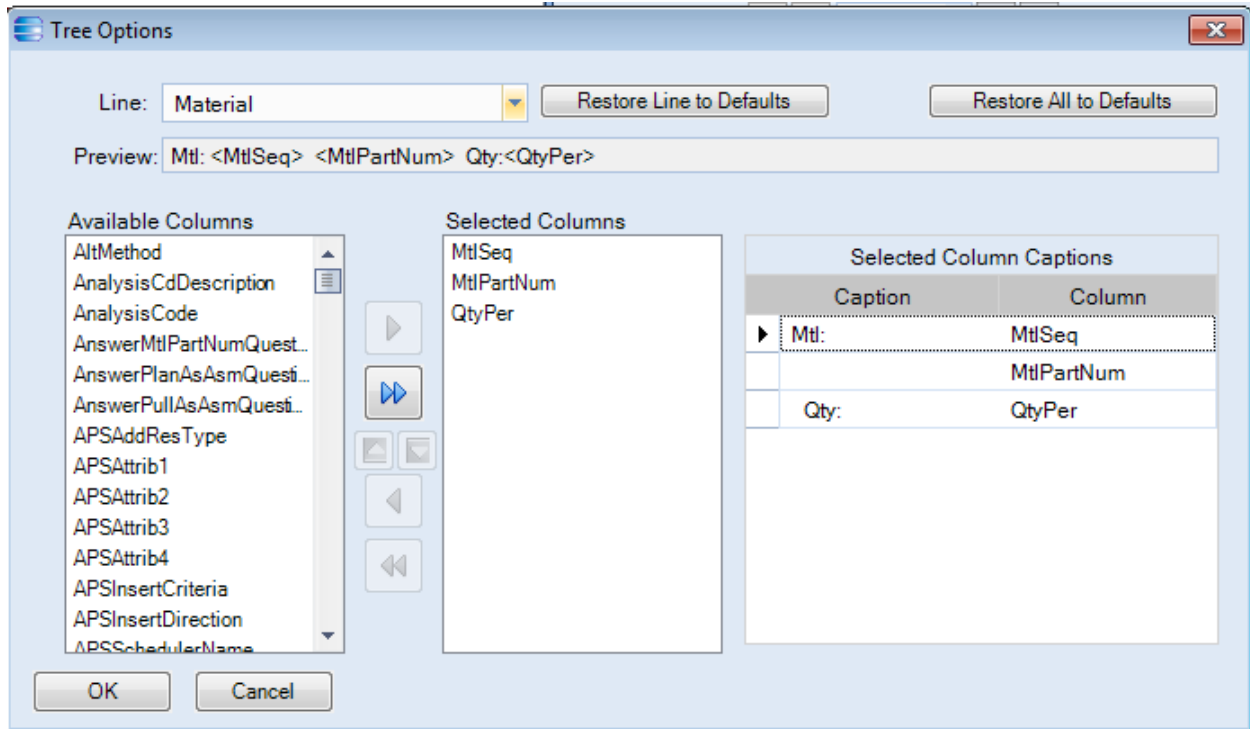
Add a Caption

You can also add a caption; will be displayed before the field on the tree line.

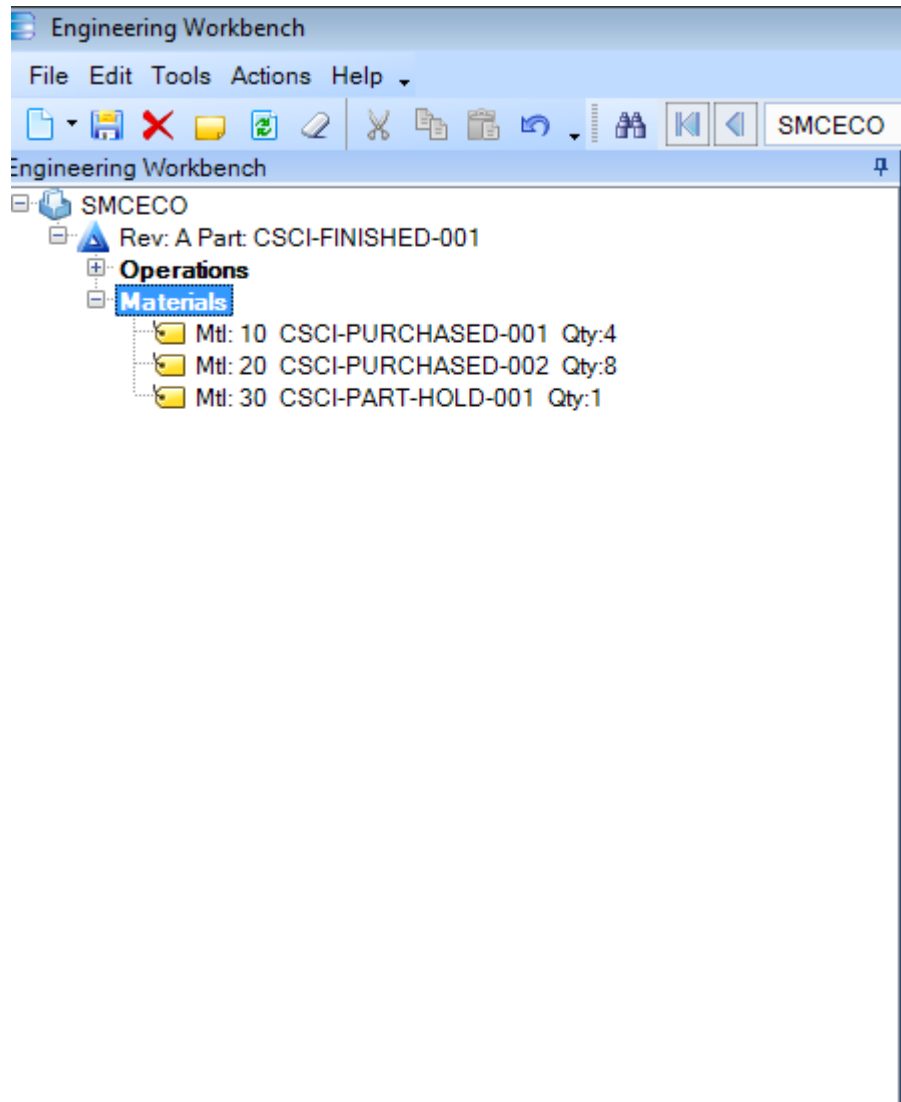We recommend adding a caption, at least a blank space, to separate the fields.

Business Process Procedure - Tree Display Changes

Tree Options - Final Result

This is the final result of our example to add the QtyPer field to the material line in the tree display of the Engineering Workbench.

Business Process Procedure - Tree Display Changes
©Copyright 2014 Crawford Software Consulting, Inc
This document is proprietary and the contents are the exclusive property of Crawford Software Consulting, Inc.
This document may not be reproduced in any form without written permission from Crawford Software Consulting, Inc.
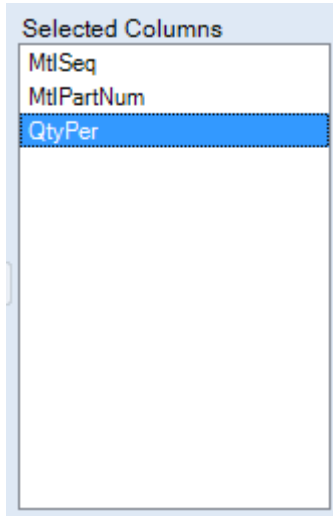
Modified View

Above is the modified tree view, note there is a space between the part number and the Qty field to improve readability.
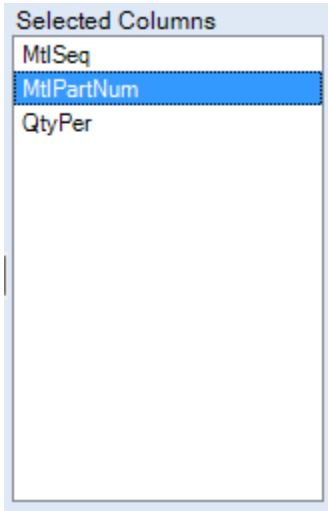
Remove a Field from the Line Display

In the Selected Columns section of the popup window, select the field that you want to remove from the display.

Click on the [arrow icon] arrow to remove the field from the selected columns section.

Change the order in the Line Display

In the Selected Columns section of the popup window, select the field that you want to move from the display.

Use the arrows to move the field left or right in the line display.