

eTurns

Carts

Help documentation



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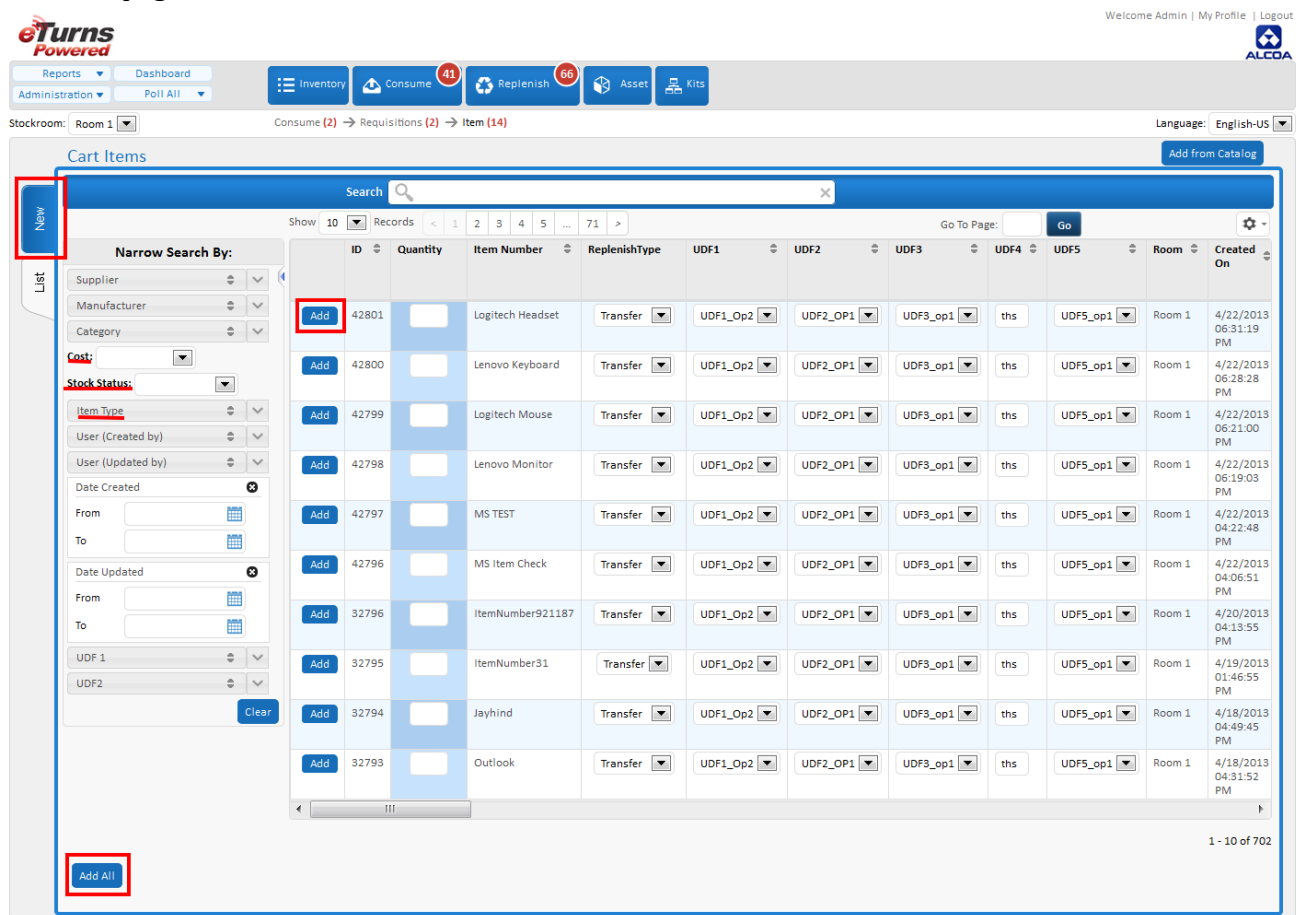
Cart as the name suggests works similar to the carts used by customer to purchase or transfer an item. It provides an option to either Purchase or Transfer various items from the list.

Guidelines

a. Add new items to Cart:

To add new items in Cart, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- A grid listing all the items of the inventory is displayed on screen.
- The user needs to enter required quantity of item in Quantity box in front of it and then click "Add".
- The user must also select the Replenish type, i.e., to Purchase or Transfer the item.
- The user may also enter various quantities together and then hit the "Add All" button at the bottom of the page.



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Figure 1

- The items to be added in the cart can be filtered by:
 - a. Supplier: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.
 - b. Manufacturer: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.

- c. Category: This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.
 - d. Cost: This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.
 - e. Stock Status: This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.
 - f. Item Type: This filter allows filtering the type of item to be entered in the cart. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.
- If the item to be added in cart not listed in the new page, user can also add the item from the catalog.
 - To add an item from the main catalog, hit “Add from Catalog” button. The screen displays all the items listed in catalog.
 - Click the “Select” button in front of the item to add the item from the catalog in the new item list for Cart.

Select Item from catalog

Search

Go To Page:

Go

Show 10 Records < 1 2 3 4 5 ... 100000 >

Narrow Search By:

Supplier

Manufacturer

Clear

	ID	Item Number	UPC	Description	Sell Price	Packing Quantity	Manufacturer Item #	Manufacturer partNumber
Select	11	ItemNumber10	079d0044fb481a832be	Description10	0.4	10	1111111	ManufacturerPart10
Select	12	ItemNumber11	1d1f64701f028156e78	Description11	0.44	11	Manufacturer 1	ManufacturerPart11
Select	13	ItemNumber12	06e2e1a0c7fd518c8bd	Description12	0.48	12	MCNICO	ManufacturerPart12
Select	14	ItemNumber13	3d54a3e601394da3de2	Description13	0.52	13	36	ManufacturerPart13
Select	15	ItemNumber14	ba0aa0852ed3c2d1455	Description14	0.56	14	test	ManufacturerPart14
Select	16	ItemNumber15	c23d02785421db04fda	Description15	0.6	15	GHXHO	ManufacturerPart15
Select	17	ItemNumber16	b0574a638f00cb2aa72	Description16	0.64	16	ALLEN	ManufacturerPart16
Select	18	ItemNumber17	16de2ec6217e62bf482	Description17	0.68	17	Manufacturer 21sdf	ManufacturerPart17
Select	19	ItemNumber18	742cdf9c9a0870e3e6a	Description18	0.72	18	HPSSAL	ManufacturerPart18
Select	20	ItemNumber19	bebc92acc7f8dae4d7c	Description19	0.76	19	man 11	ManufacturerPart19

11 - 20 of 1,000,000

Figure 2

b. Edit/Update cart items:

To update/edit the items quantity and other functionalities each item field has an Expand/Collapse icon, ‘+/-’

Click on ‘+’ icon to expand the view as follows:


ItemID		Item name		Quantity	
32793		Outlook		99	
Show 10 records		Go To Page		Go	
Update		10134 Outlook 87		Purchase UDF1_Op2 UDF2_OP1 UDF3_op1 ths UDF5_op1 4/24/2013 03:03:54 PM 4/24/2013 03:03:54 PM	
Update		10140 Outlook 4		Purchase UDF1_Op2 UDF2_OP1 UDF3_op1 ths UDF5_op1 4/24/2013 03:30:24 PM 4/24/2013 03:30:24 PM	
Update		10142 Outlook 8		Transfer UDF1_Op2 UDF2_OP1 UDF3_op1 ths UDF5_op1 4/24/2013 03:31:21 PM 4/24/2013 03:31:21 PM	
1 - 3 of 3					

Figure 3

The various details of the item can be edited by the user. Hit 'Update' after the changes are complete. To return back to previous view, click '-' icon.

To edit any cart item the user must have the required authorization.

c. Delete an item in Cart:

A item can be deleted, by selecting the field and then click on Delete icon  or press Delete key on your keyboard. The user may also delete the selected or multiple fields. A pop up verifies your selection and then deletes the selected fields.






ItemID		Item name		Quantity							
32793		Outlook		99							
Show 10 records < 1 > Go To Page Go  											
	ID	Item name	Quantity	ReplenishType	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Upd On
Update 	10134	Outlook	87	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:03:54 PM	4/24/2013 03:03:54 PM
Update 	10140	Outlook	4	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:30:24 PM	4/24/2013 03:30:24 PM
Update 	10142	Outlook	8	Transfer	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:31:21 PM	4/24/2013 03:31:21 PM
1 - 3 of 3											

Figure 4

d. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- Print: It prints the selected page.
- Excel: It converts the page to excel sheet.
- CSV: It converts the page to CSV sheet.
- PDF: It converts the page to PDF document.
- Copy: It copies the page to Clipboard.

Cart Items

Search

View: [List View Icon] [Table View Icon]

Show 10 Records < 1 > Go To Page: [Go]

Narrow Search By:

- Replenish type
- Supplier
- User (Created by)
- User (Updated by)
- Date Created
- From
- To
- Date Updated
- From
- To

Clear

ID	Item name	Quantity	ReplenishType	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On
10134	Outlook	87	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:03:54 PM	4/24/2013 03:03:54 PM
10140	Outlook	4	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:30:24 PM	4/24/2013 03:30:24 PM
10142	Outlook	8	Transfer	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:31:21 PM	4/24/2013 03:31:21 PM


1 - 3 of 3

ID	Item name	Quantity
32794	Jayhind	150
32795	ItemNumber31	89
32796	ItemNumber921187	56
42797	MS TEST	5
42798	Lenovo Monitor	10
42799	Logitech Mouse	17
42800	Lenovo Keyboard	14
42801	Logitech Headset	11

1 - 9 of 9

Figure 5

e. View change log for a Cart item:

To view the updated history of an item in cart, hit  icon of the current item field. A pop up opens and it displays when the item was added to cart and the number of times it was updated.

ItemID: 32793 Item name: Outlook Quantity: 99

Show 10 records < 1 > Go To Page: [Go]

ID	Item name	Quantity	ReplenishType	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On
10134	Outlook	87	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:03:54 PM	4/24/2013 03:03:54 PM
10140	Outlook	4	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:30:24 PM	4/24/2013 03:30:24 PM
10142	Outlook	8	Transfer	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:31:21 PM	4/24/2013 03:31:21 PM

1 - 3 of 3

Figure 6

Change log

ID	Item name	Quantity	ReplenishType	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By	Created By
10140	Outlook	6	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:30:24 PM	4/24/2013 03:55:22 PM	Admin	Admin
10140	Outlook	4	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:30:24 PM	4/24/2013 03:31:37 PM	Admin	Admin
10140	Outlook	4	Purchase	UDF1_Op2	UDF2_OP1	UDF3_op1	ths	UDF5_op1	4/24/2013 03:30:24 PM	4/24/2013 03:30:24 PM	Admin	Admin

Copy CSV Excel PDF Print

Figure 7

f. Search the Cart for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

- i. **Main Search:** To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

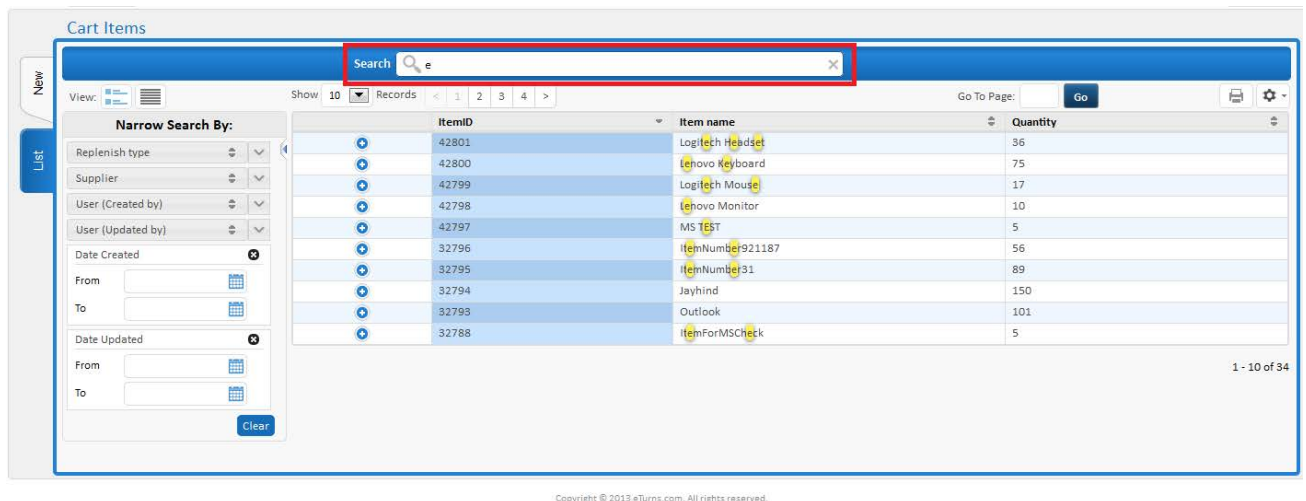



Figure 8

- ii. **Narrow Search by:** As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.
 - To open Narrow search, click on the small Triangular icon  on the top left corner of the screen.
 - The following screen appears:

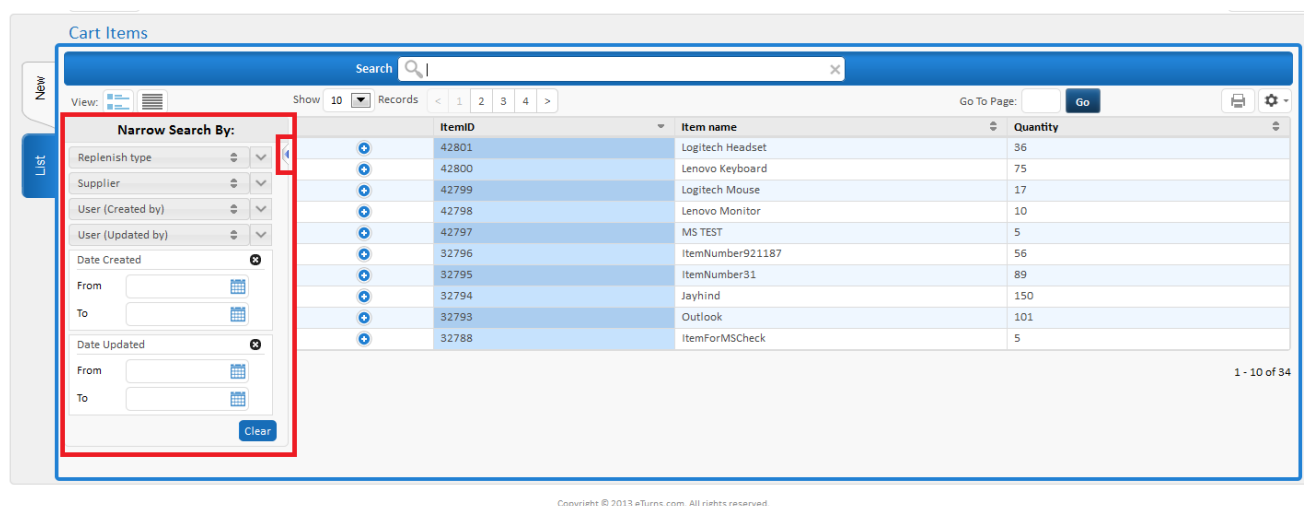
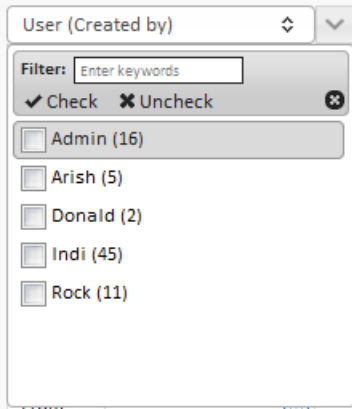
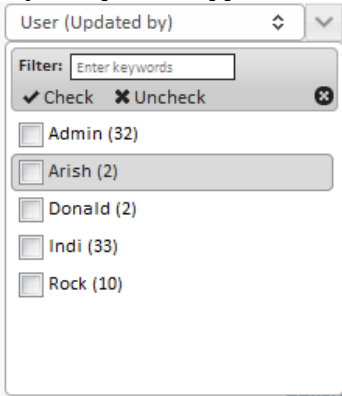

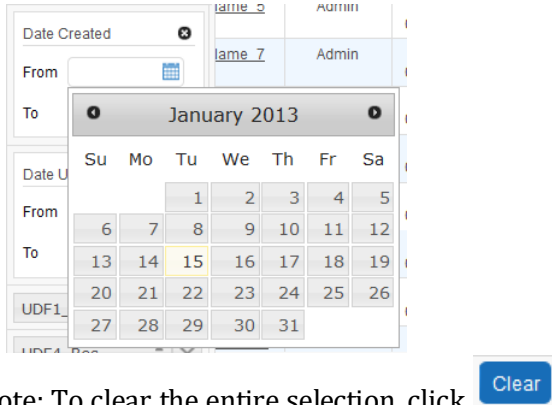



Figure 9

Field	Description
User Created by	<p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>
User Updated by	<p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made. Note: To cancel the selections made at any point of time, click .</p>
Date Created and Date Updated	<p>They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.</p>  <p>Note: To clear the entire selection, click .</p>

Note: At point of time only one of the either searches will work.

g. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click “Go”.

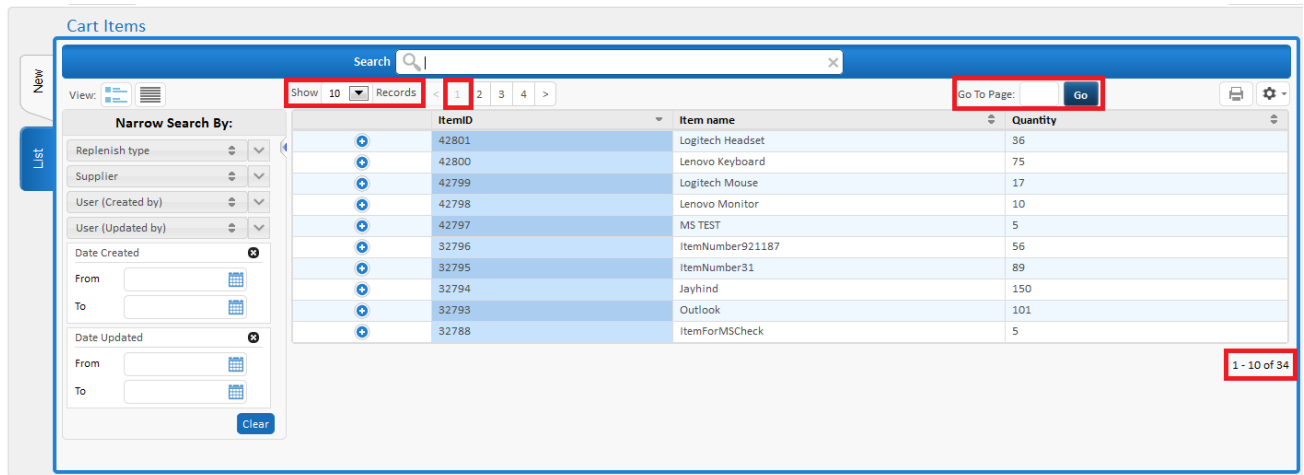


Figure 10

h. View mode in Cart:

The cart offers user to view the items in two different views:

1. **Group view:** This view displays the actions performed on an item grouped together, i.e., number of times an item was purchased or transferred, in a single field.

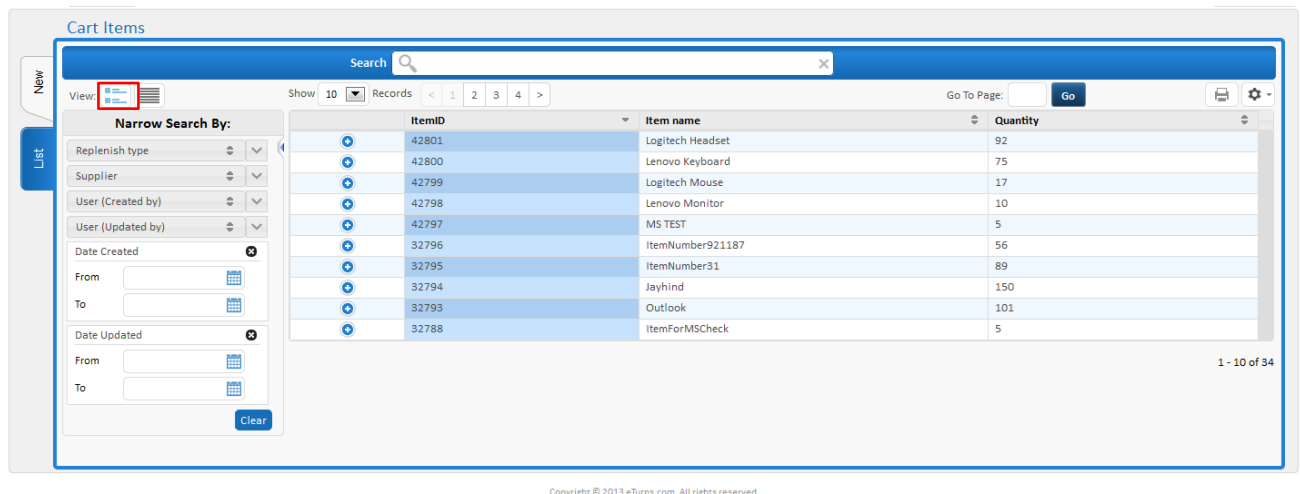


Figure 11

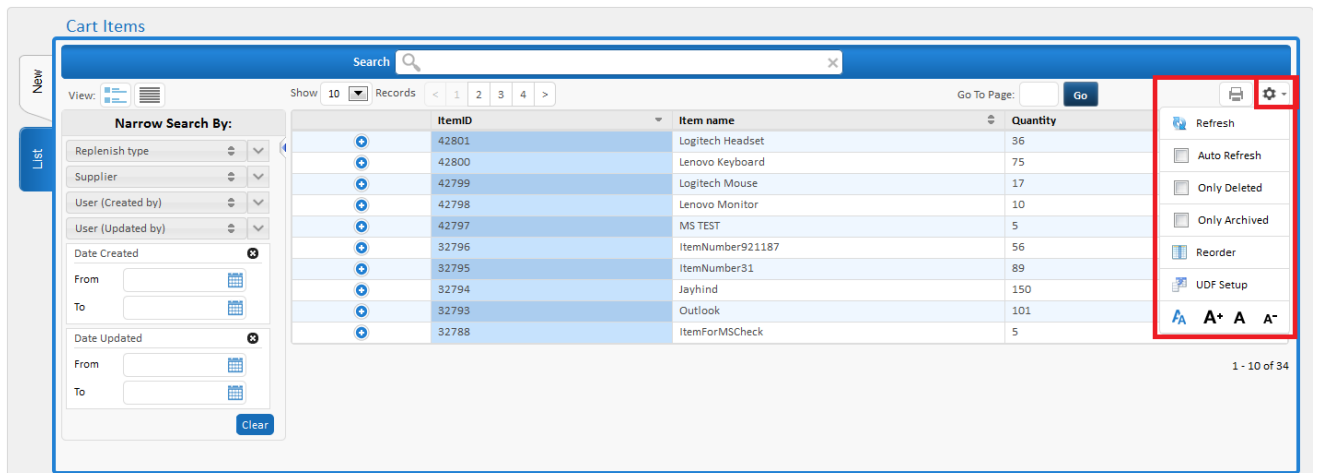
2. **Individual view:** This view displays the various actions taken on the items in grid view. An item can feature as many times as it was edited/updated by the user.

Figure 12

i. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

- a) **Refresh:** This option refreshes the module and displays the latest changes implemented.
- b) **Auto Refresh:** This option automatically refreshes the screen in specified time.
- c) **Only Deleted:** This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.
- d) **Only Archived:** This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.
- e) **Reorder:** This option enables user to reorder the columns of the module.
 - User can also select which field to appear on screen and which remains to be hidden.
 - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
 - User may also drag and drop fields to be arranged in order of choice.
 - After the selection is completed, click “Reorder”.



Cart Items

Search

View: [Grid Icon] [List Icon] Show: 10 Records: < 1 2 3 4 > Go To Page: [] Go

Narrow Search By:

Replenish type [v]

Supplier [v]

User (Created by) [v]

User (Updated by) [v]

Date Created [x]

From [] To []

Date Updated [x]

From [] To []

Clear

ItemID	Item name	Quantity
42801	Logitech Headset	36
42800	Lenovo Keyboard	75
42799	Logitech Mouse	17
42798	Lenovo Monitor	10
42797	MS TEST	5
32796	ItemNumber921187	56
32795	ItemNumber31	89
32794	Jayhind	150
32793	Outlook	101
32788	ItemForMSCheck	5

Refresh
Auto Refresh
Only Deleted
Only Archived
Reorder
UDF Setup
A+ A A-

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Figure 13

j. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing

Multi selection of rows by clicking each row