eTurns

Quick List

Help documentation

9-1-16

Contents

Quick List consists of a number of items grouped together to be ordered / requisitioned/ or Pulled simultaneously for user convenience. They are like a “Favorite” on an e-commerce site. Quick Lists are also like “mini-kits” of items/labor/kits/other Quick Lists that can be added to Orders, Work Order Pulls or Credits, Requisitions, Kits, Asset or Tool maintenance, or simple Pulls.

Menu options:

a. Open Quick list:

To open quick list, click Quick list from Inventory dropdown, then the New button on the left side of grid.

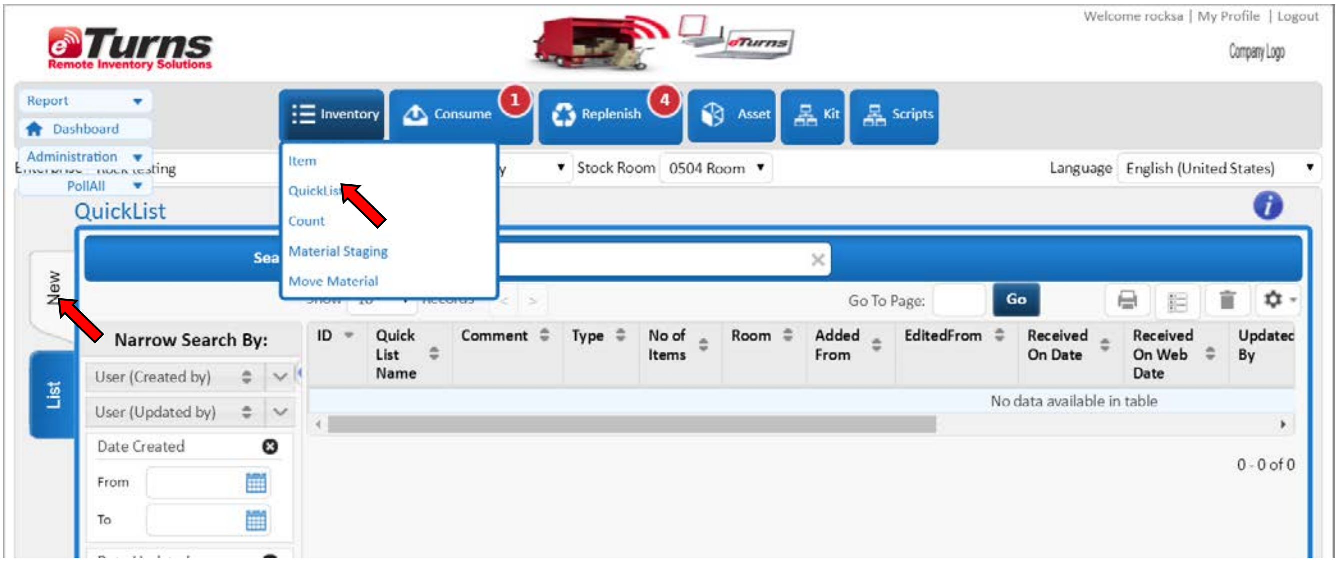


Figure 1

b. Create a New Quick list:

The following page appears to create a New QL:

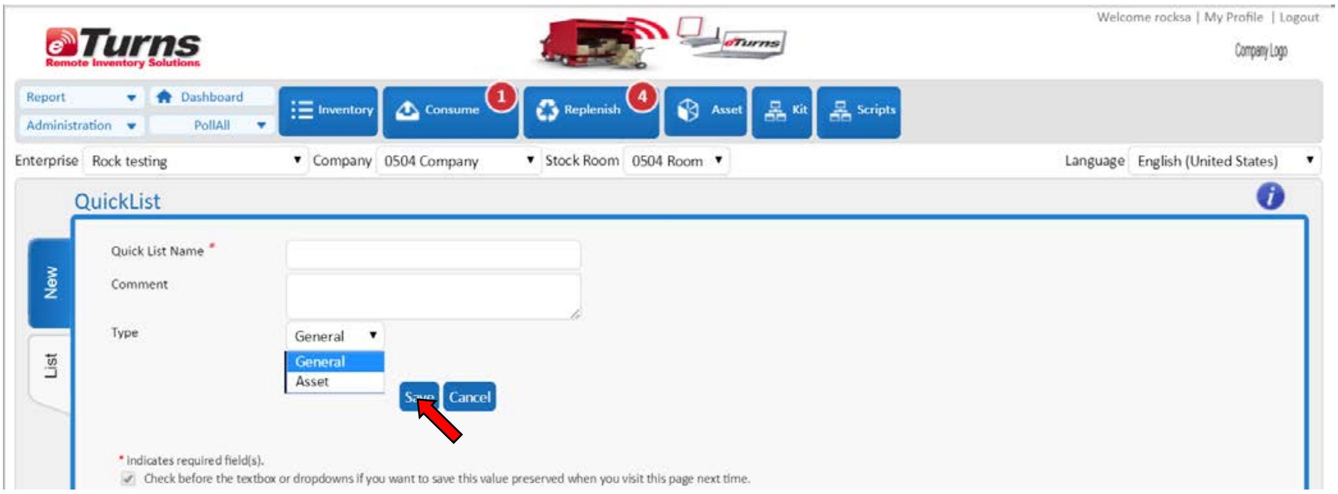


Figure 2

- Enter the QL header information and click "Save". The Add New Items grid then appears.
  - Quick List name: This will used to identify the QL in the Item grid
  - Description: User description of the purpose of the QL
  - Type:
    - General: List of items to add in bulk to an Order, WO, Requisition, etc.
    - Asset: These are items to add to the Scheduled or typical maintenance of Assets or Tool Schedules.

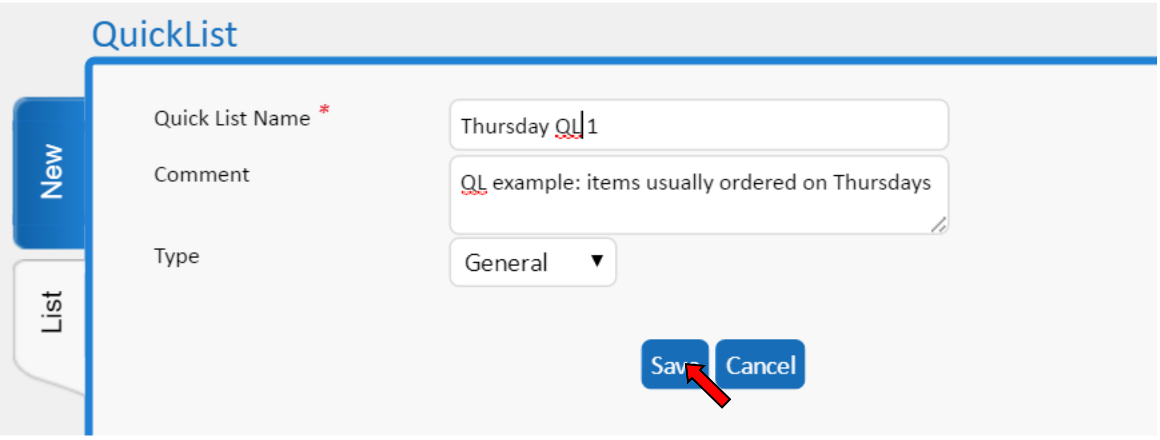


Figure 3

- The grid of items displays for the user to add to the quick list after entering the quantity needed. Remember, a QL can include other QLs and Kits and Labor type items.
- **ADDING ITEMS:** The user can add new items, QLs, Kits, or labor in two ways:
  - Click in Qty text box and enter Quantity to use. The click in row to select that row. Continue to do the same for other items on the page of items displayed. When done selecting all items, then click Add at the bottom of the grid. All selected items in the quantities chosen will be added to the QL.
  - Alternatively, enter the quantity to use for the item wanted. Then click Add on the left of the row. This one item will be added to the QL.
  - The Narrow Search on the left or Global Search at the top of the item grid can be used to find the items/QLs/kits/labor that you want to add to the QL.
- When done adding items to the QL, click Close at bottom of item grid.
- The QL will display with the header and the items just added in a grid below the header.
- Click on the List at the left edge of the QL module or Save and the grid of QLs will display.
  - The QL Name is underlined indicating it is the link to Edit the QL or View the QL.
  - The grid indicates also the # of items in the QL.
- **ADD ADDITIONAL NEW ITEMS TO QL:** At this point, or at a later time, the QL can have additional items added to it by clicking New Item at the top left of the grid. This will add new items to the QL FROM THIS POINT FORWARD. It will not retroactively change any items added using the QL in the past.
- **DELETE QL ITEMS:** Items can also be deleted from the QL. Simply select the row of an item that you wish to delete and then click the trash can in the upper right of the grid. After confirmation, the item will be deleted from the QL.

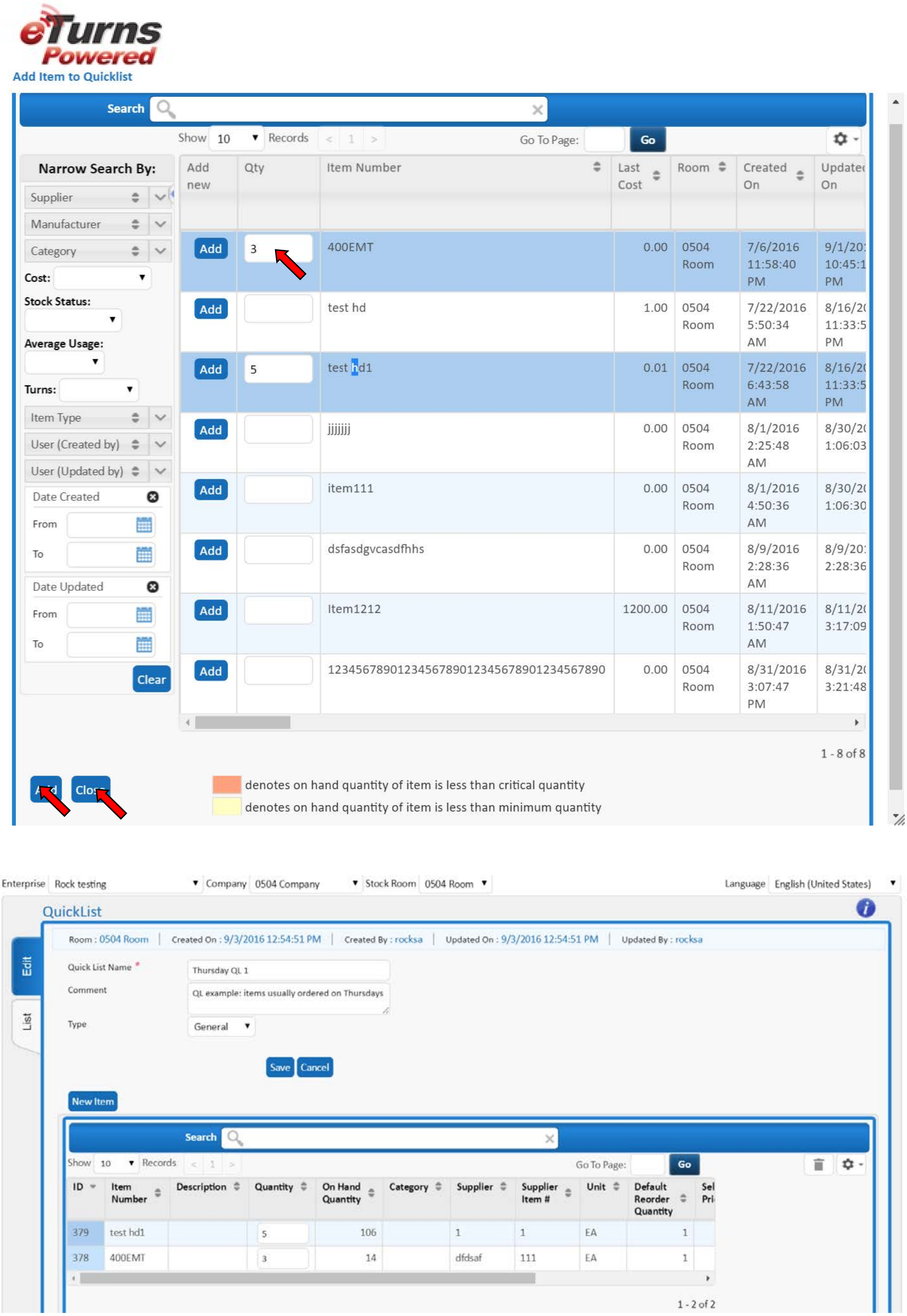
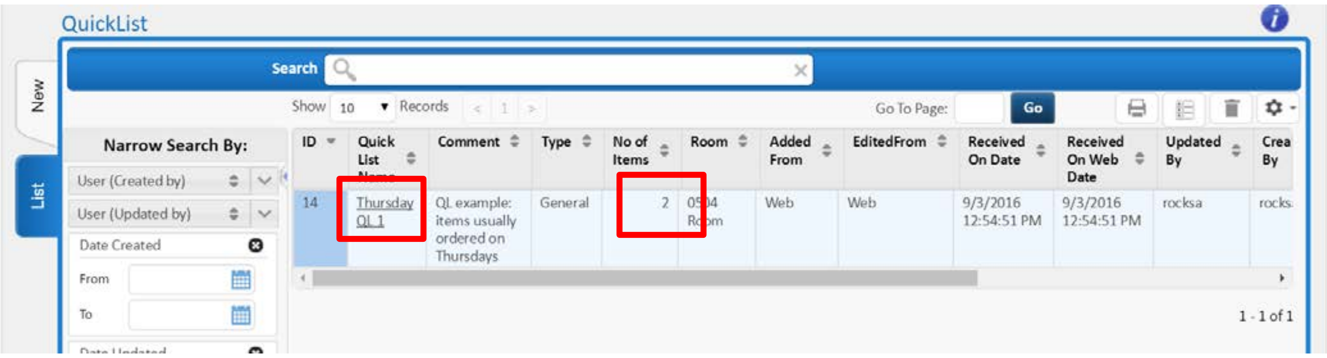

eTurns Powered
Add Item to Quicklist
Search
Show 10 Records
Go To Page:
Go
Narrow Search By:
Supplier
Manufacturer
Category
Cost:
Stock Status:
Average Usage:
Turns:
Item Type
User (Created by)
User (Updated by)
Date Created
From
To
Date Updated
From
To
Clear
Add new
Qty
Item Number
Last Cost
Room
Created On
Updated On
Add
3
400EMT
0.00
0504 Room
7/6/2016 11:58:40 PM
test hd
1.00
7/22/2016 5:50:34 AM
5
test hd1
0.01
7/22/2016 6:43:58 AM
jjjjjj
8/1/2016 2:25:48 AM
item111
8/1/2016 4:50:36 AM
dsfasdgvcasdfhhs
8/9/2016 2:28:36 AM
Item1212
1200.00
8/11/2016 1:50:47 AM
1234567890123456789012345678901234567890
8/31/2016 3:07:47 PM
1 - 8 of 8
denotes on hand quantity of item is less than critical quantity
denotes on hand quantity of item is less than minimum quantity
Enterprise Rock testing
Company 0504 Company
Stock Room 0504 Room
Language English (United States)
QuickList
Room : 0504 Room
Created On : 9/3/2016 12:54:51 PM
Created By : rocksa
Updated On : 9/3/2016 12:54:51 PM
Updated By : rocksa
Edit
List
Quick List Name *
Thursday QL 1
Comment
QL example: items usually ordered on Thursdays
Type
General
Save
Cancel
New Item
Search
Show 10 Records
Go To Page:
Go
ID
Item Number
Description
Quantity
On Hand Quantity
Category
Supplier
Supplier Item #
Unit
Default Reorder Quantity
379 test hd1 5 106 1 1 EA 1
378 400EMT 3 14 dfdsaf 111 EA 1
1 - 2 of 2

Figure 4



c. Export the page:

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

a) Excel: It converts the page to excel sheet.
b) CSV: It converts the page to CSV sheet.
c) Bar code labels: It prints bar code labels for each of the QL names based on the Label selected in the Bar Code label design module.

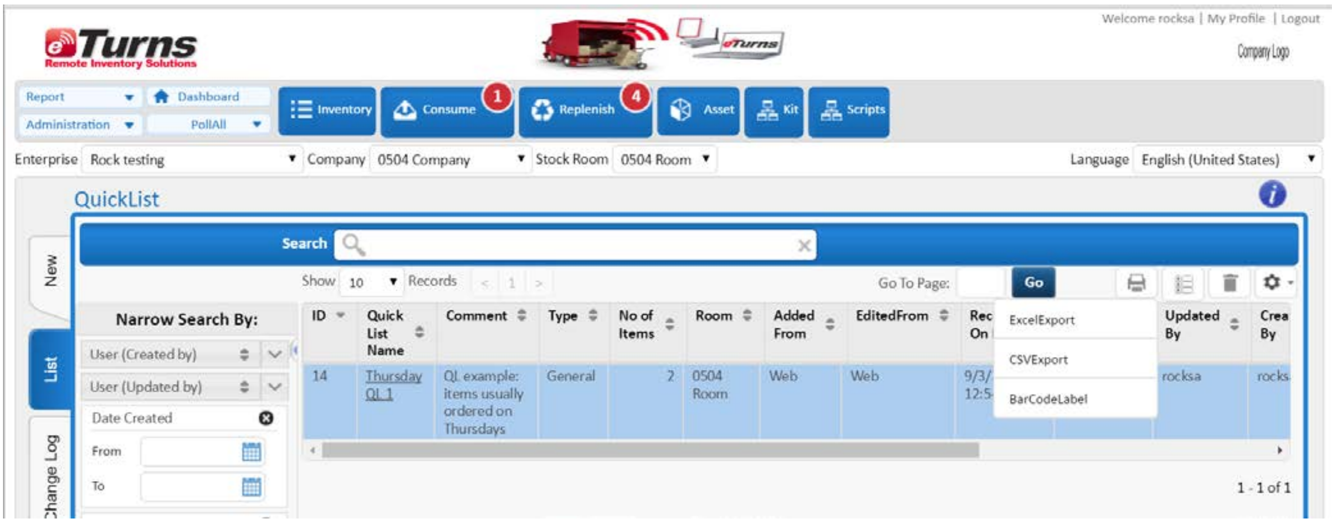
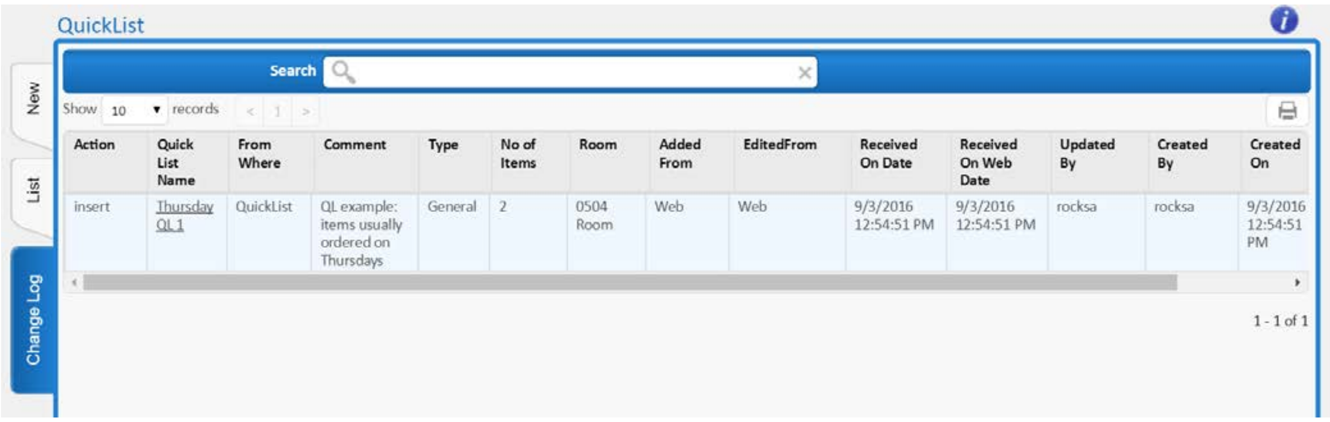


Figure 7

d. View change log for a Quick List:

To view the updated history of a quick list, select the list and click on Change log tab. It displays when the list was created and the number of times it was updated.

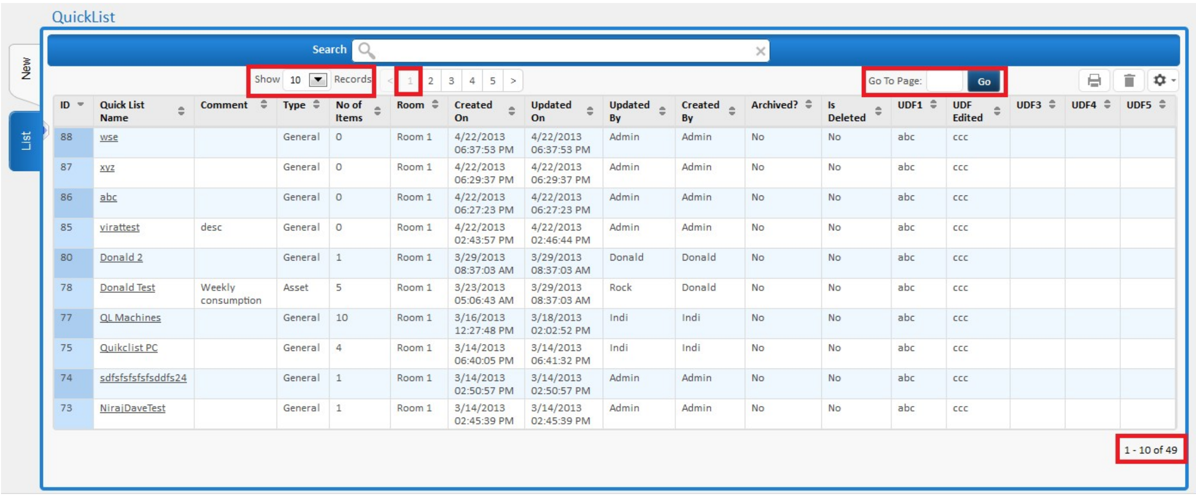


Action	Quick List Name	From Where	Comment	Type	No of Items	Room	Added From	EditedFrom	Received On Date	Received On Web Date	Updated By	Created By	Created On
insert	Thursday QL 1	QuickList	QL example: items usually ordered on Thursdays	General	2	0504 Room	Web	Web	9/3/2016 12:54:51 PM	9/3/2016 12:54:51 PM	rocksa	rocksa	9/3/2016 12:54:51 PM

Figure 8

e. 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".



ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited	UDF3	UDF4	UDF5
88	wse		General	0	Room 1	4/22/2013 06:37:53 PM	4/22/2013 06:37:53 PM	Admin	Admin	No	No	abc	ccc			
87	xyz		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc			
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc			
85	virattest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc			
80	Donald 2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc			
78	Donald Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc			
77	QL Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc			
75	Quikclist PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc			
74	sdfsfsfsfsfsddfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc			
73	NirajDaveTest		General	1	Room 1	3/14/2013 02:45:39 PM	3/14/2013 02:45:39 PM	Admin	Admin	No	No	abc	ccc			

Figure 9

f. Implement various settings:

The user may choose from the below functions for 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 records 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 records 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”.

f) Font point size: Large, Medium, or Small

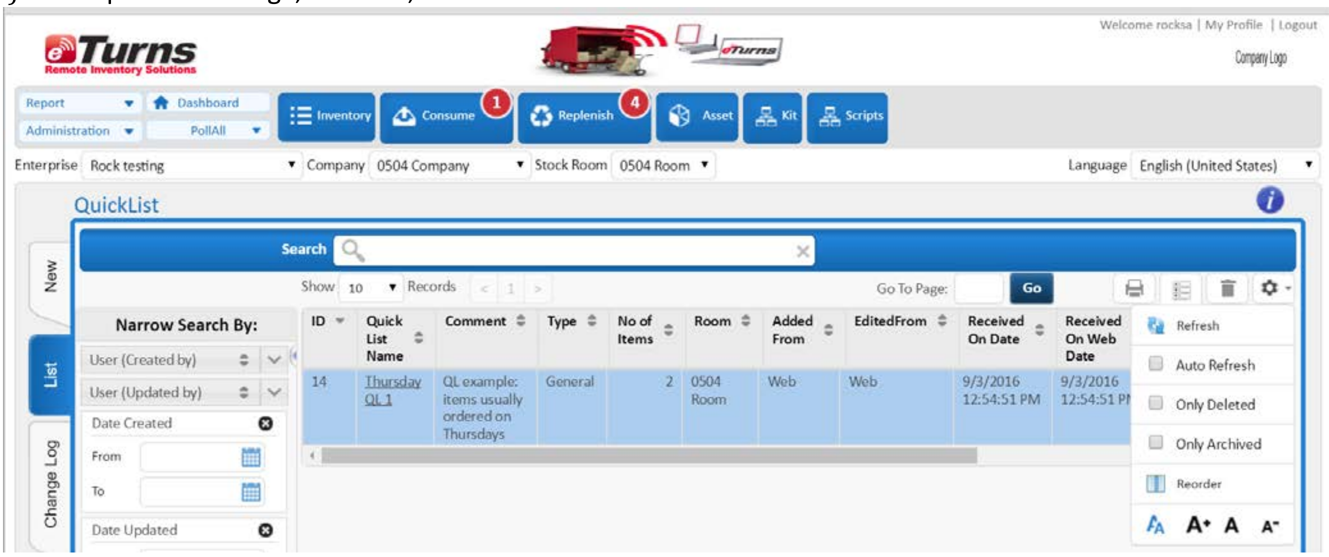


Figure 13

g. 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
5. Multi selection of rows by clicking each row