eTurns

Quick List

Help documentation

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Quick List consists of number of items grouped together to be ordered simultaneously for user convenience. The items that are needed often are collected together to form a Quick list. The Quick list can be used for multiple purposes.

Guidelines

a. Open Quick list:

To open quick list, user may either select Quick list from Inventory dropdown or simply click the Quick list icon listed under Inventory on Dashboard.

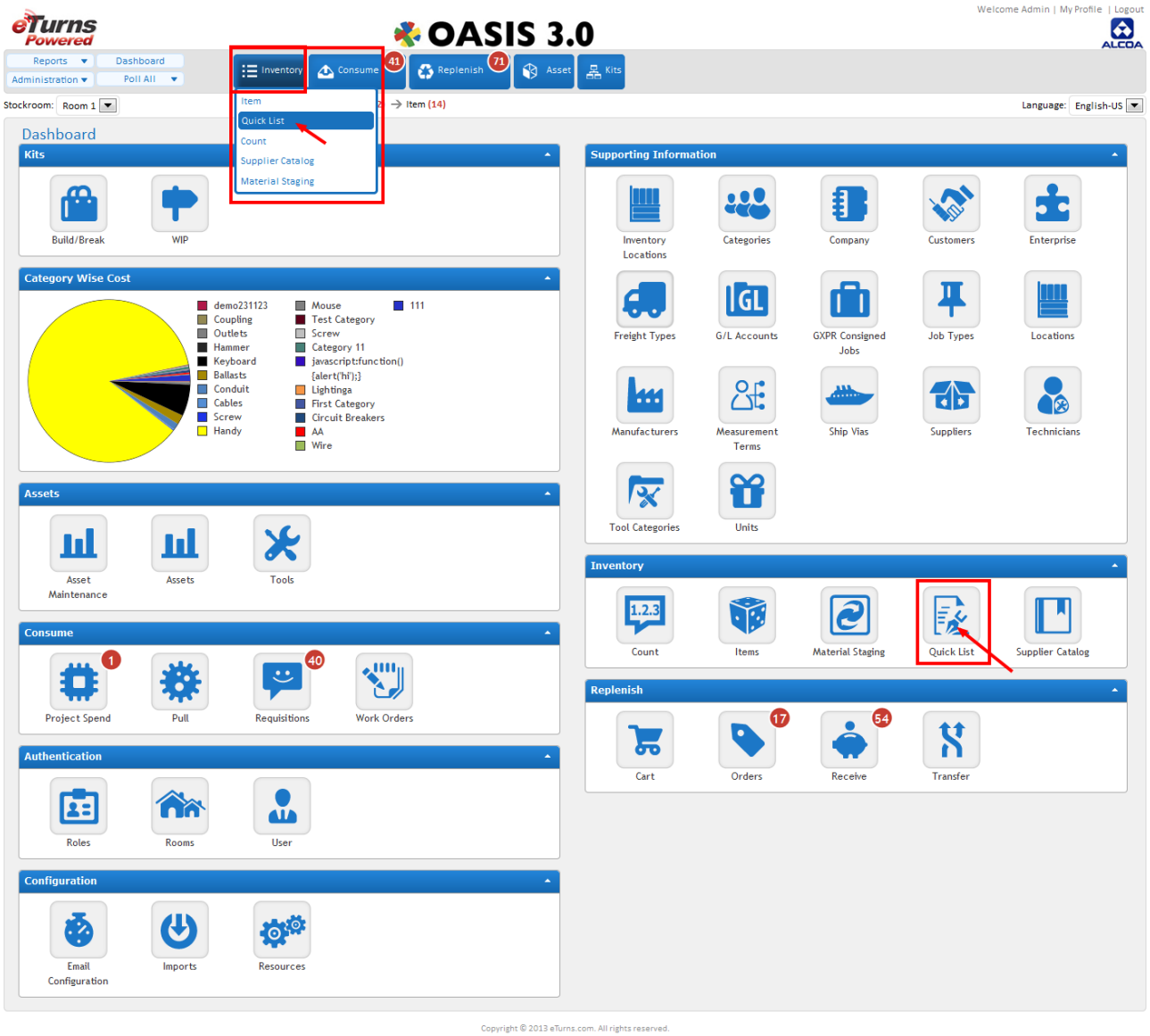


Figure 1

The following page appears on screen:

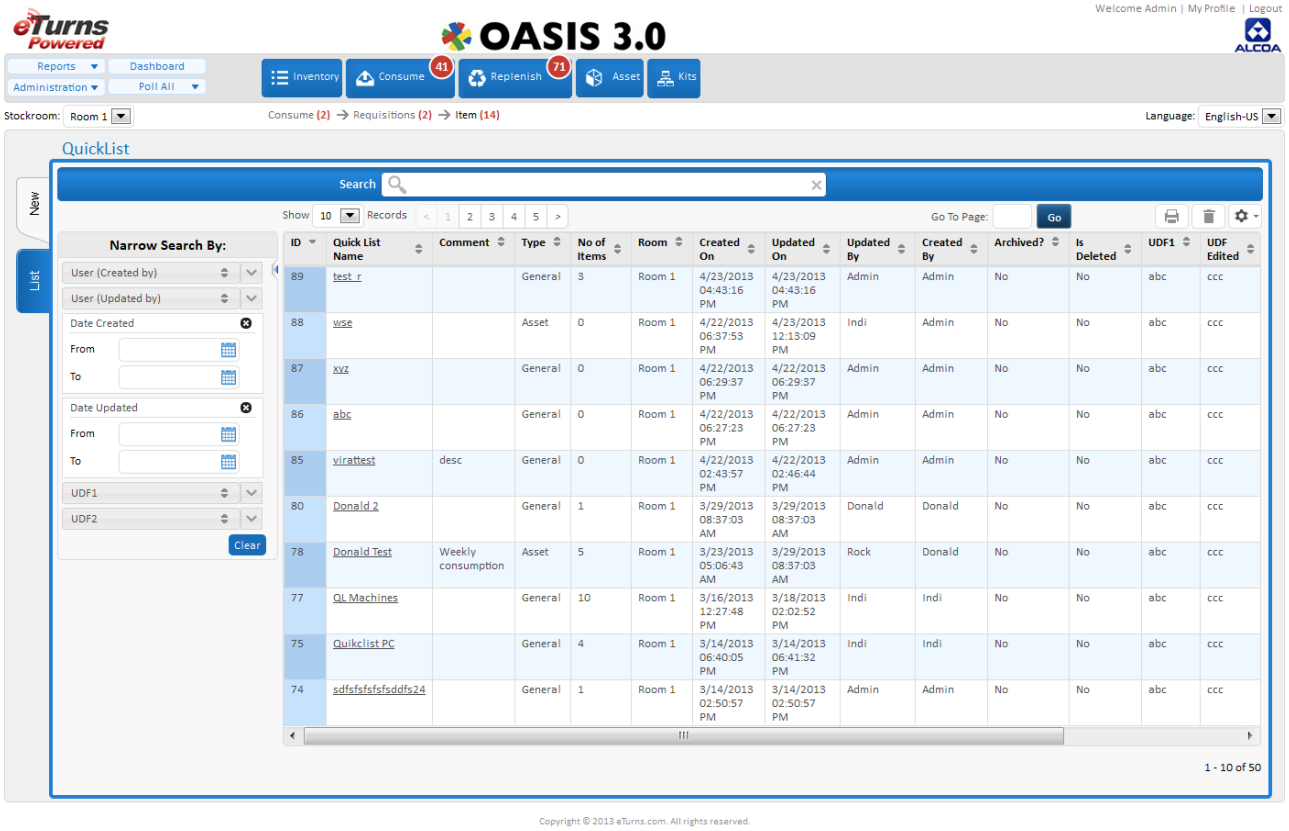


Figure 2

b. Create a New Quick list:

To create a new quick list, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- Enter the particulars and hit "Save" button, the New Items grid then appears on screen, to add new items to the list.

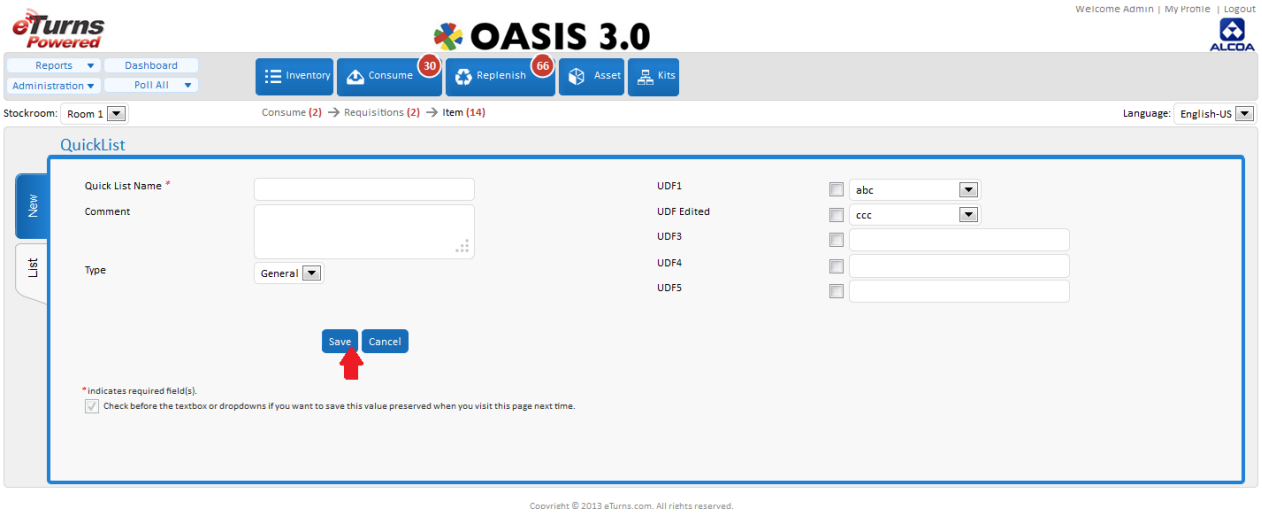


Figure 3

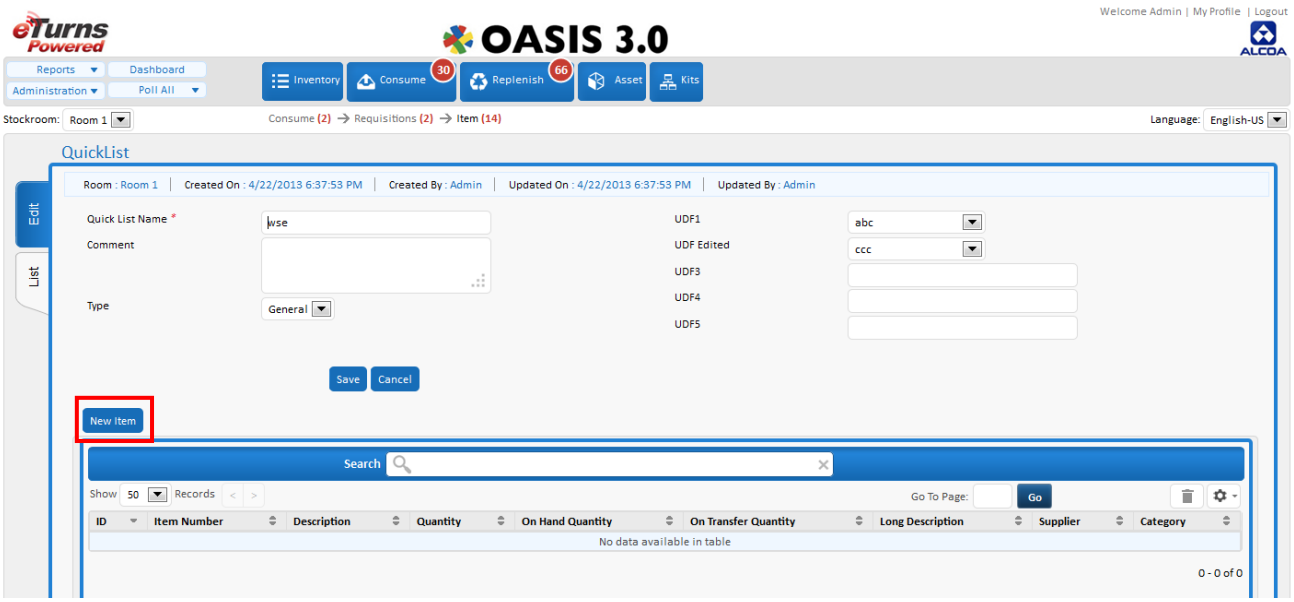


Figure 4

- The "New Item" button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click "Add". The user may also enter various quantities together and then hit the "Add All" button at the bottom of the page. To close the selection, hit "Close".

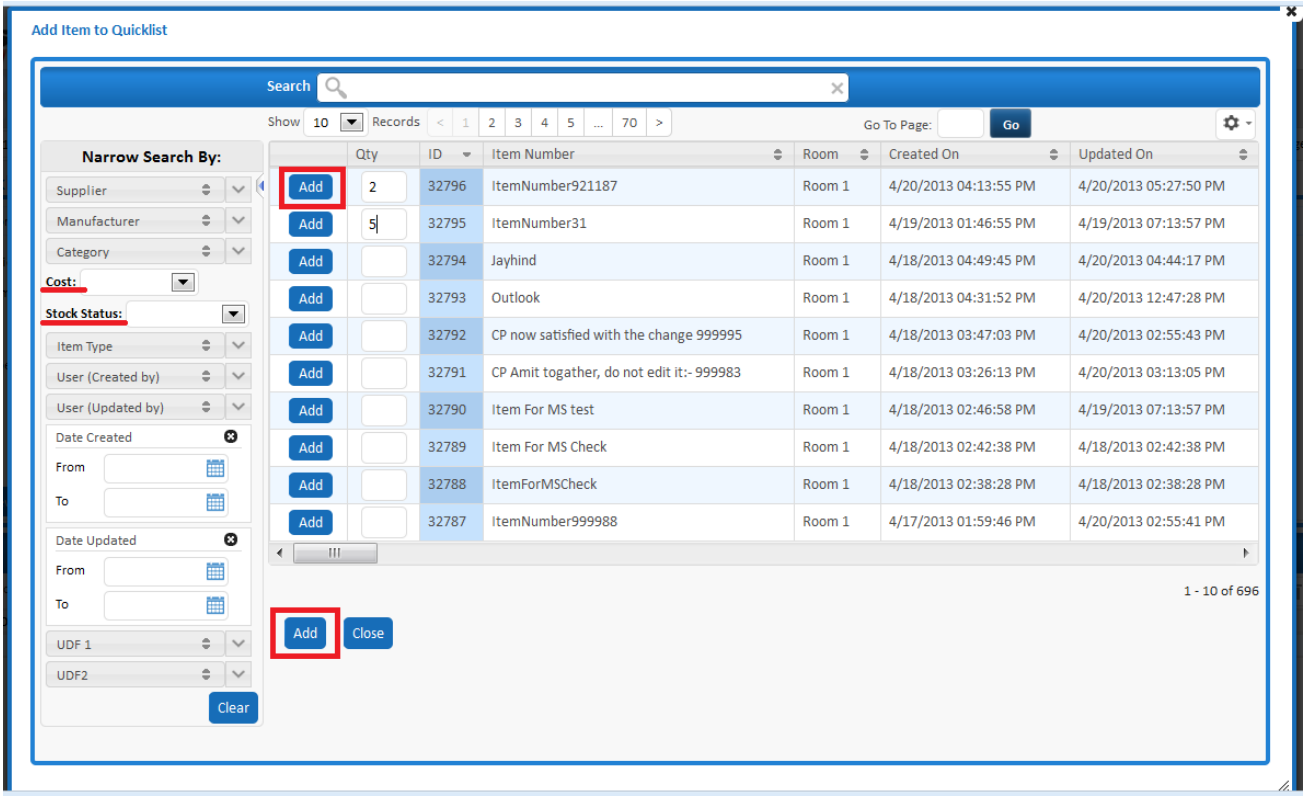


Figure 5

- The items to be added in the quick list 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 quick list. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.

- Once the Close button is hit, only then the entries from the pop up grid are entered in the main New Items grid. The grid can also be closed by click on icon.

Note: Quick list provides an option to preserve the values entered next time user visits the page, by checking the check box provided at end of new quick list page. REFER Figure 3

c. Edit an existing Quick List:

To edit an existing Quick list in any module, click on the item and new screen in accordance to the selected tab appears on screen. The quantity of item may be updated; also new items can be added to quick list as well as deleted. To edit any item in list the user must have the required authorization.

d. Delete a Quick List:

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

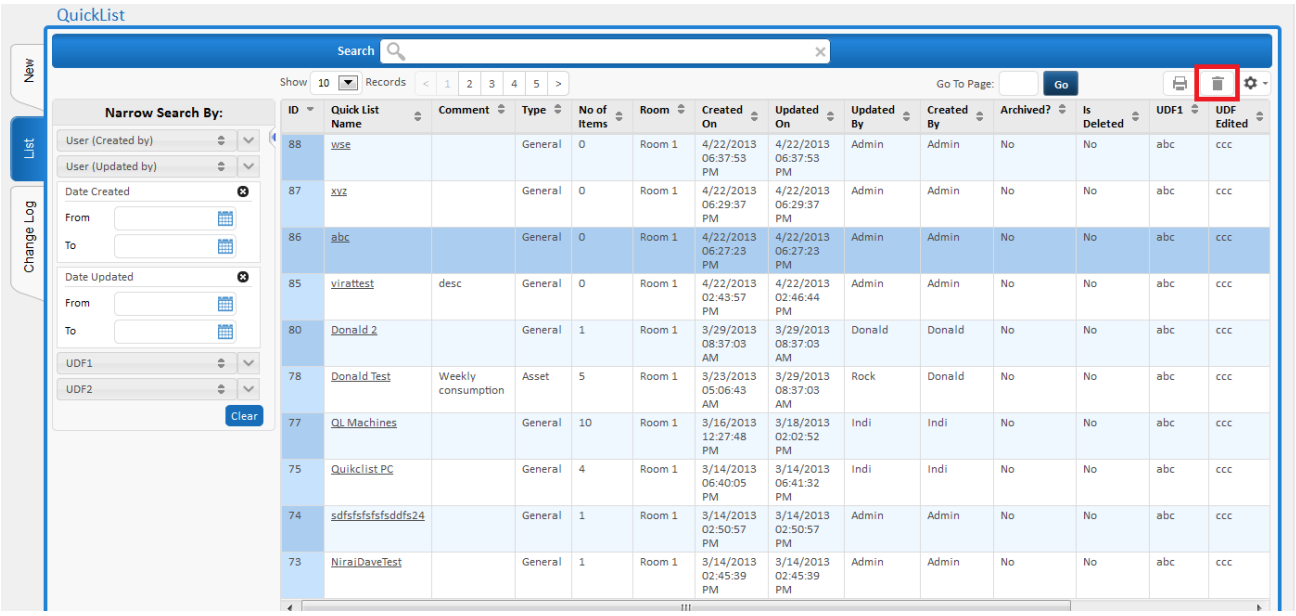


Figure 6

e. 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:

a) Print: It prints the selected page.
b) Excel: It converts the page to excel sheet.
c) CSV: It converts the page to CSV sheet.
d) PDF: It converts the page to PDF document.
e) Copy: It copies the page to Clipboard.

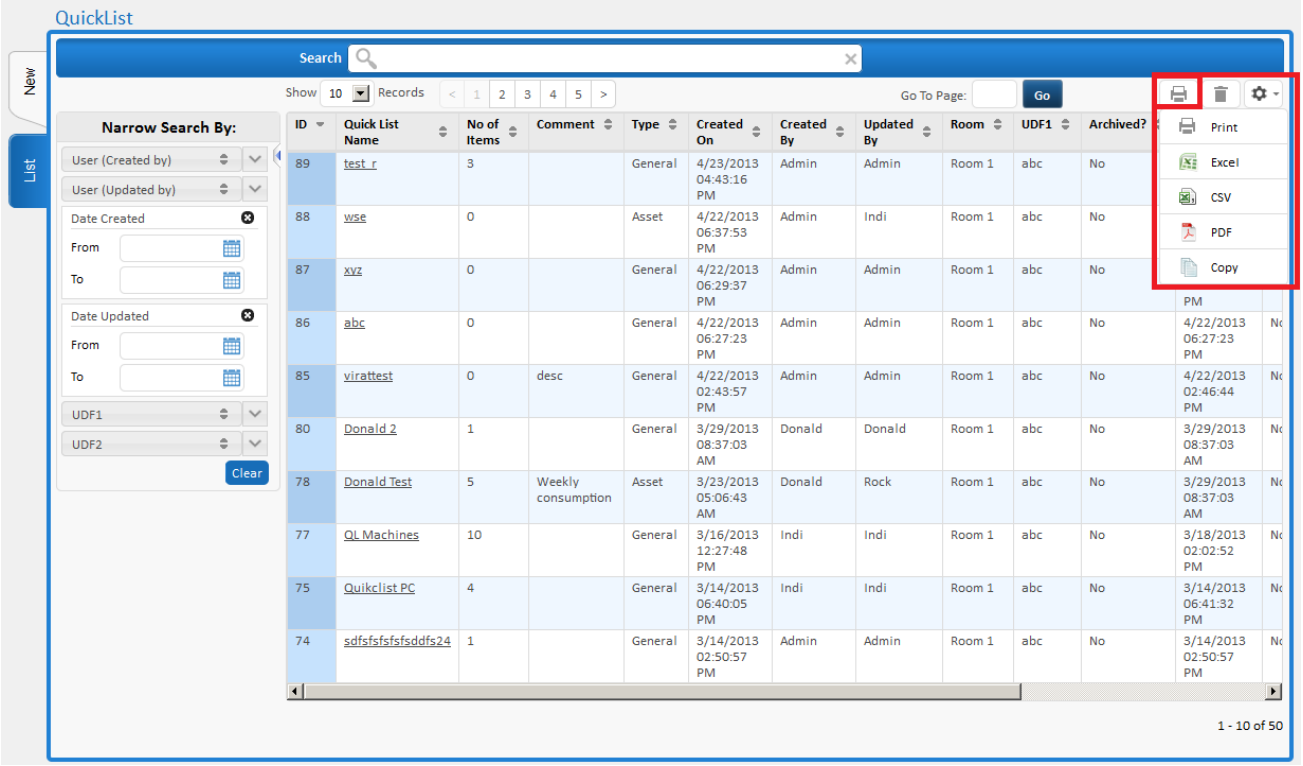


Figure 7

f. 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.

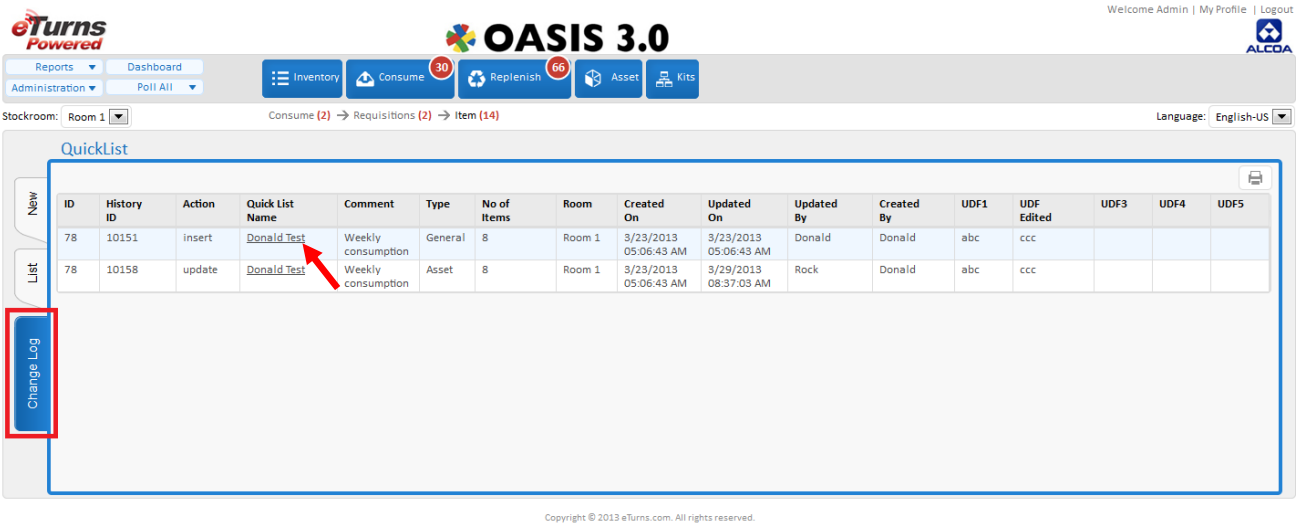


Figure 8

To view the log for individual items of the quick list, click on item name and items change log is displayed in a pop up.

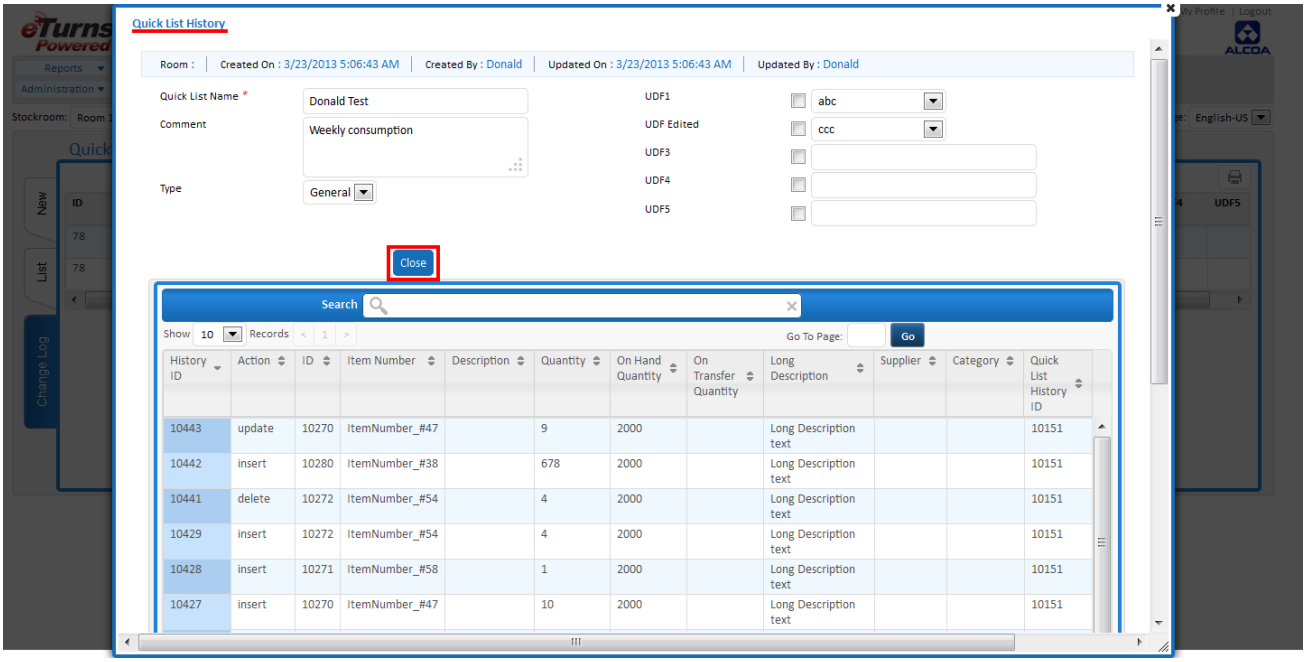


Figure 9

Note: The Change log is displayed in View only mode.

g. Search the Quick list 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.

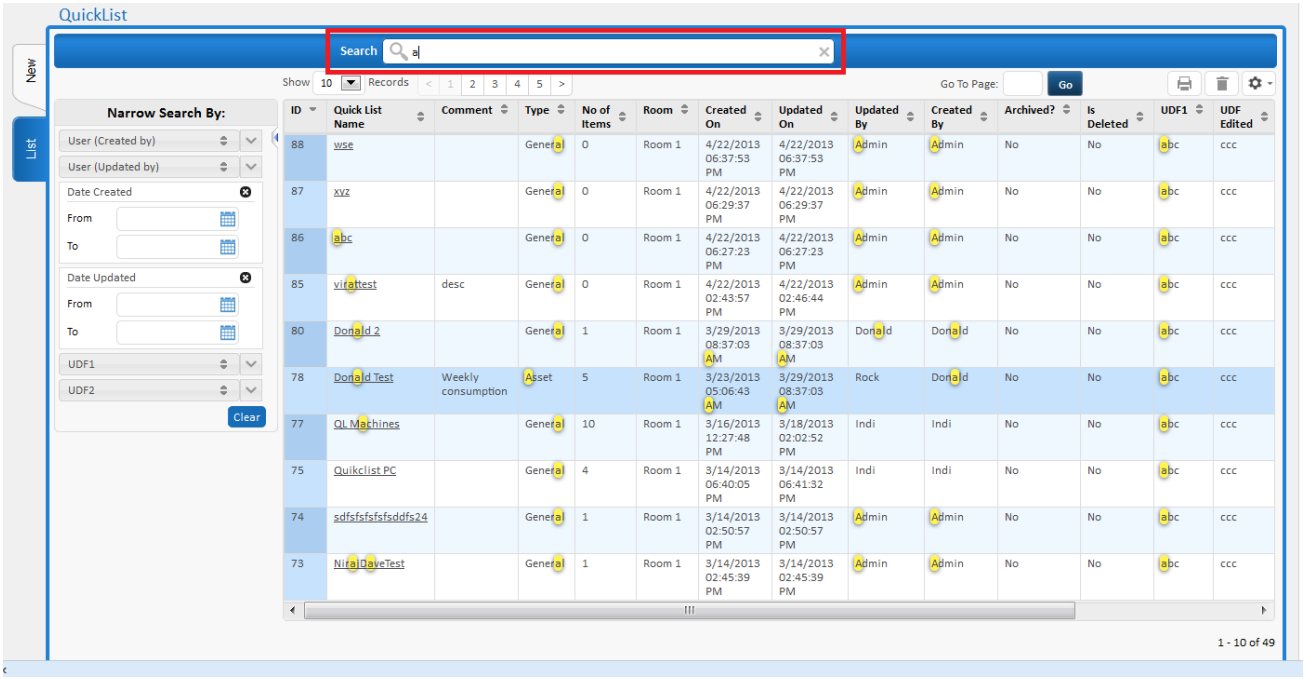


Figure 10

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:

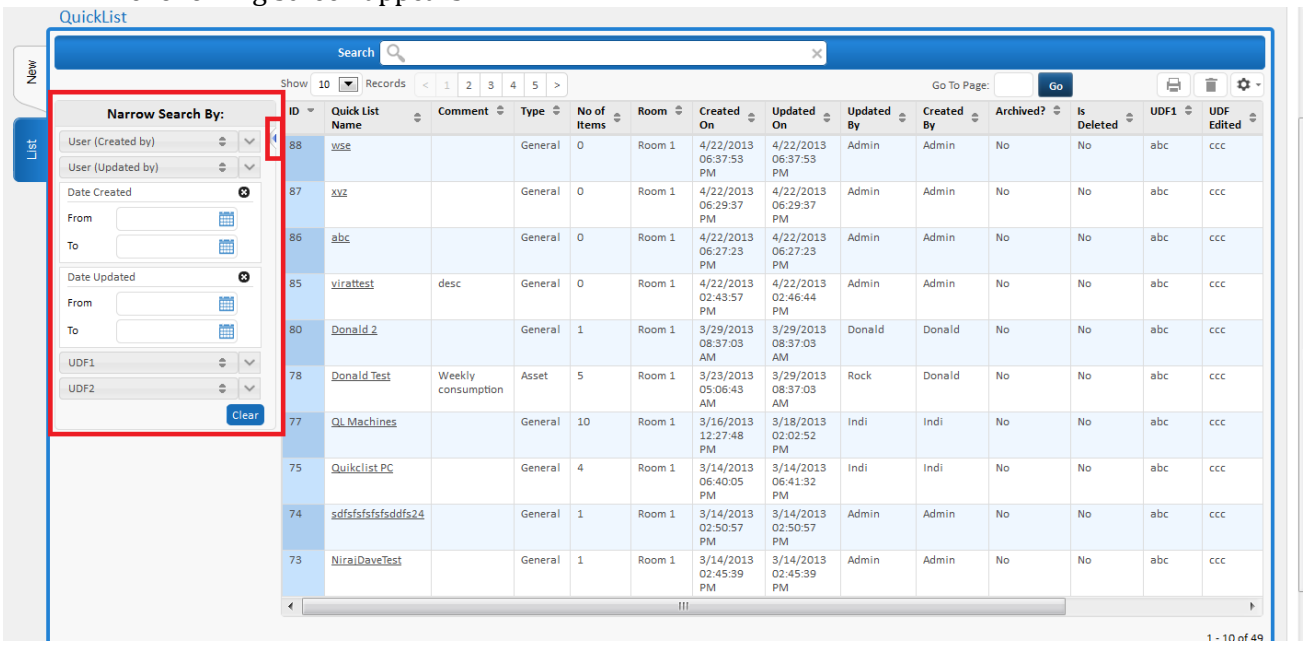
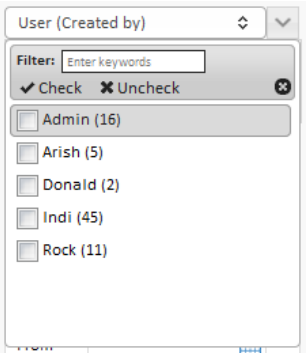
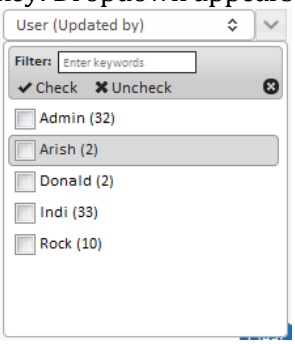
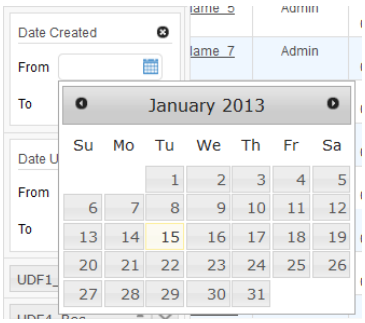


Figure 11

Field	Description
User Created by	It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:  User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.
User Updated by	It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears:  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 ⊗.
Date Created and Date Updated	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.  Note: To clear the entire selection, click

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

h. 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".

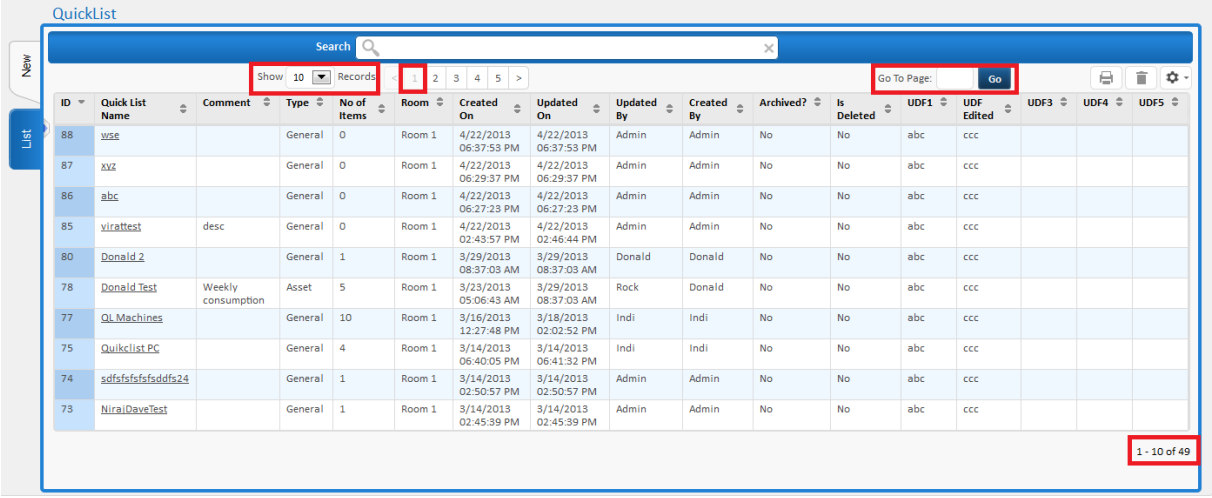


Figure 12

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 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".

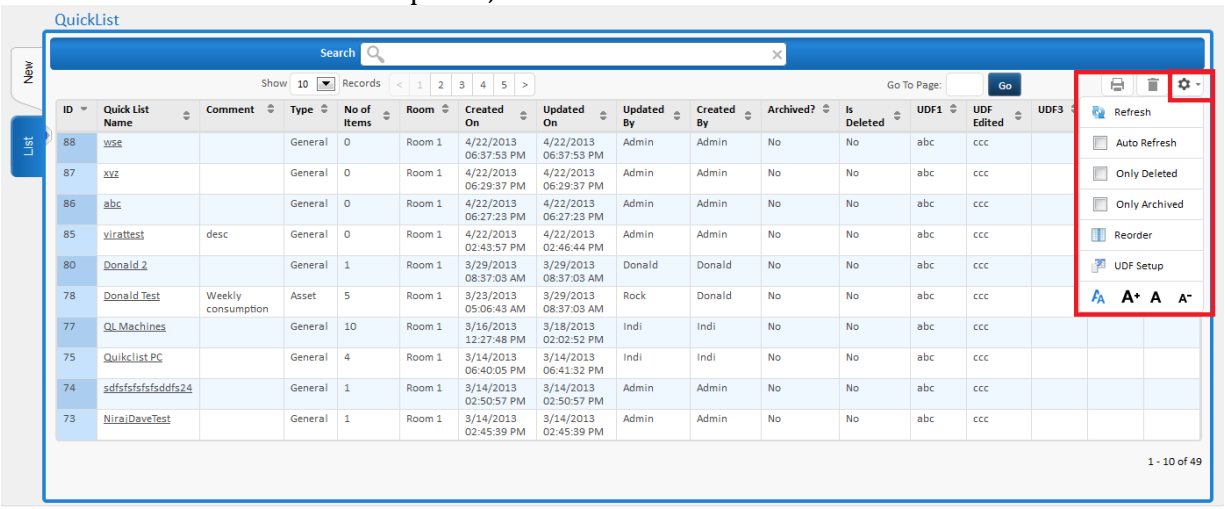


Figure 13

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