eTurns

Customers

Help documentation

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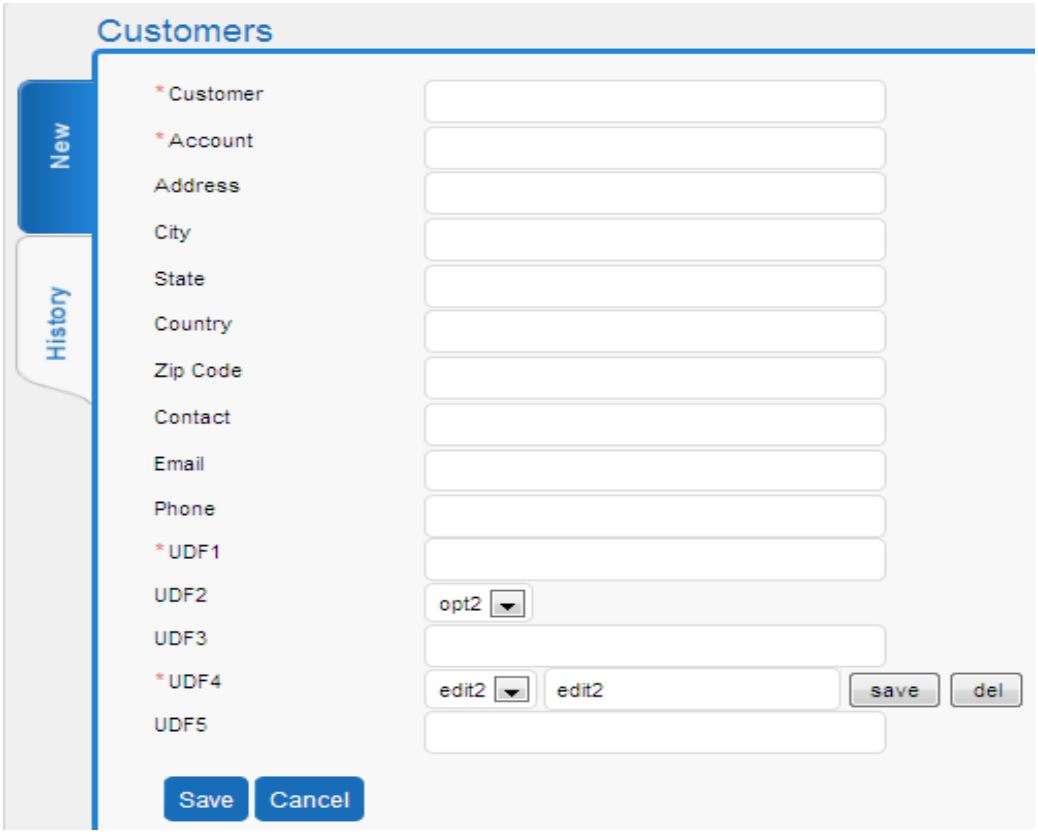
1. Editing features

a. New

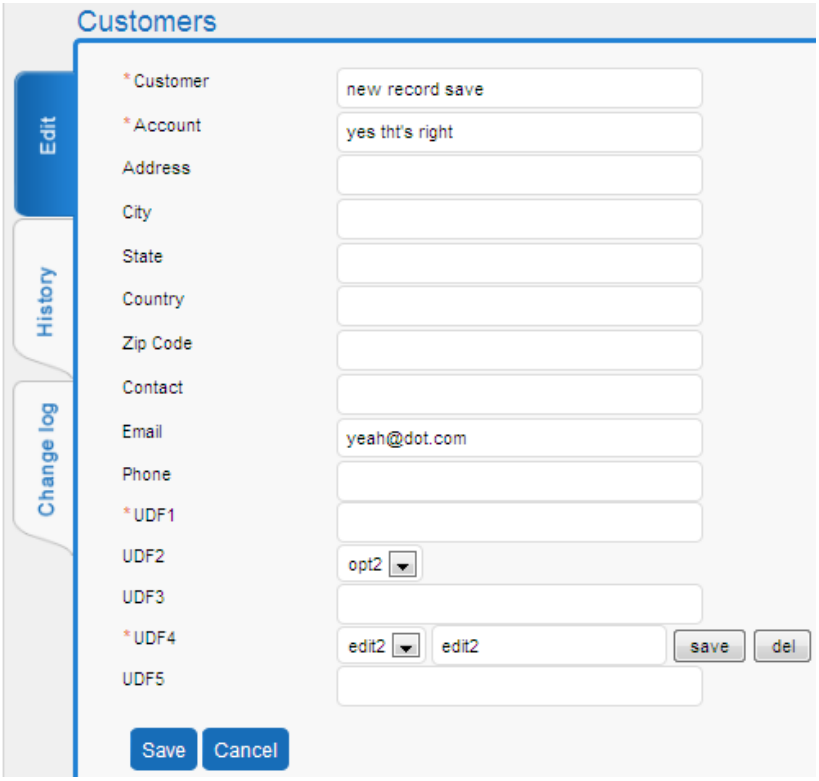
It enables the user to create a new field, depending on the authority level. The user can either click on vertical tab "New" on the screen or right click and select 'New' from the list. The following screen is displayed:



User can save records hitting "Enter" key of the key board or clicking "Save" button. Clicking "Cancel" button will redirect user to "History" tab.

b. Edit

It enables the user to edit an existing field, depending on the authority level. Select the field to be edited and click on it. The following screen is displayed:

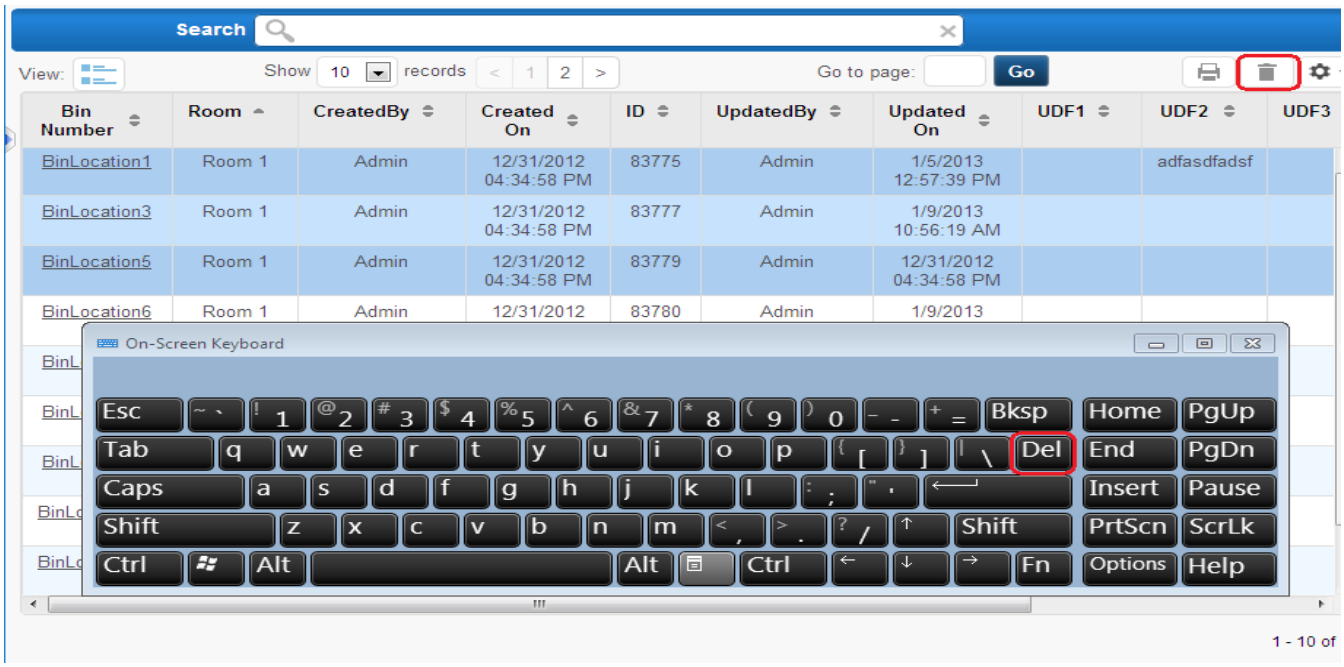


User can save records hitting "Enter" key of the key board or clicking "Save" button. Clicking "Cancel" button will redirect user to "History" tab.

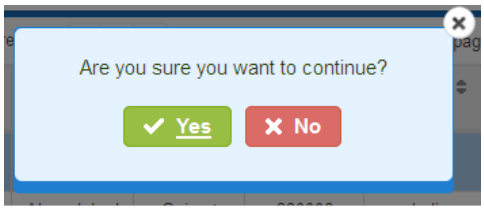
Note: The fields marked star are compulsory to enter.

c. Delete

- It enables user to delete the selected or multiple fields. Select the field by clicking on it and then click on Delete icon or press Delete key on your keyboard.



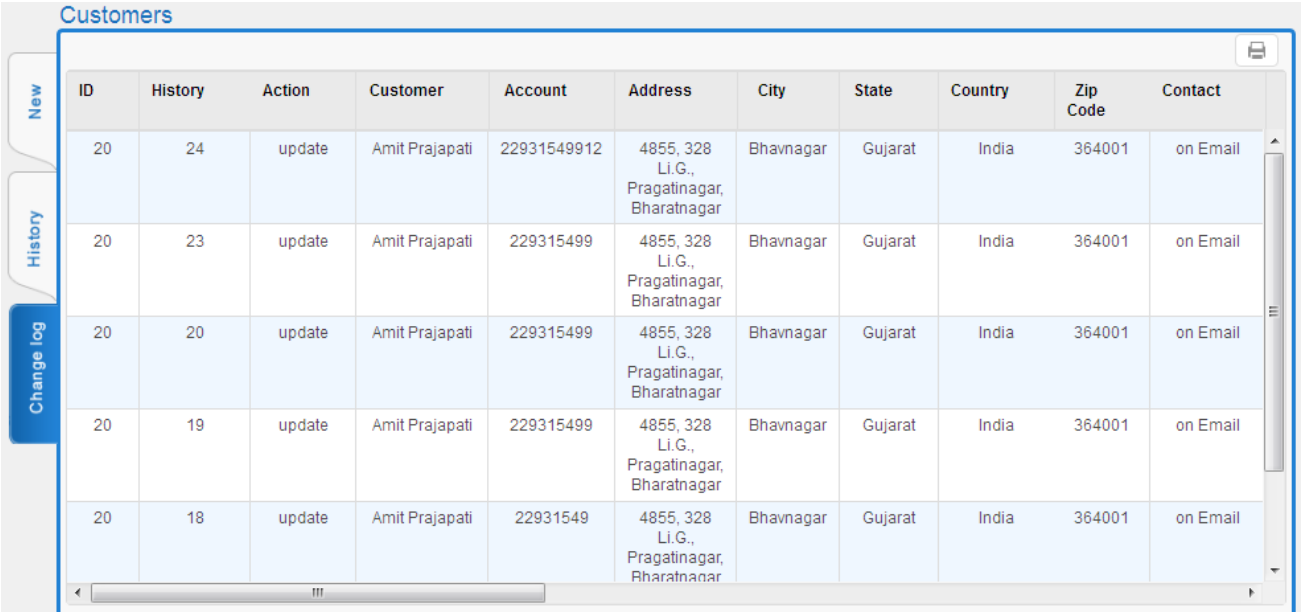
- The following pop-up appears:



- Select Yes to delete and No to return back to previous screen.

d. Change log

It enables the user to check the update history of particular field, i.e, when the field was created and the number of times it was updated. The user must select the field, and then click on vertical tab "Change log". The following screen is displayed:



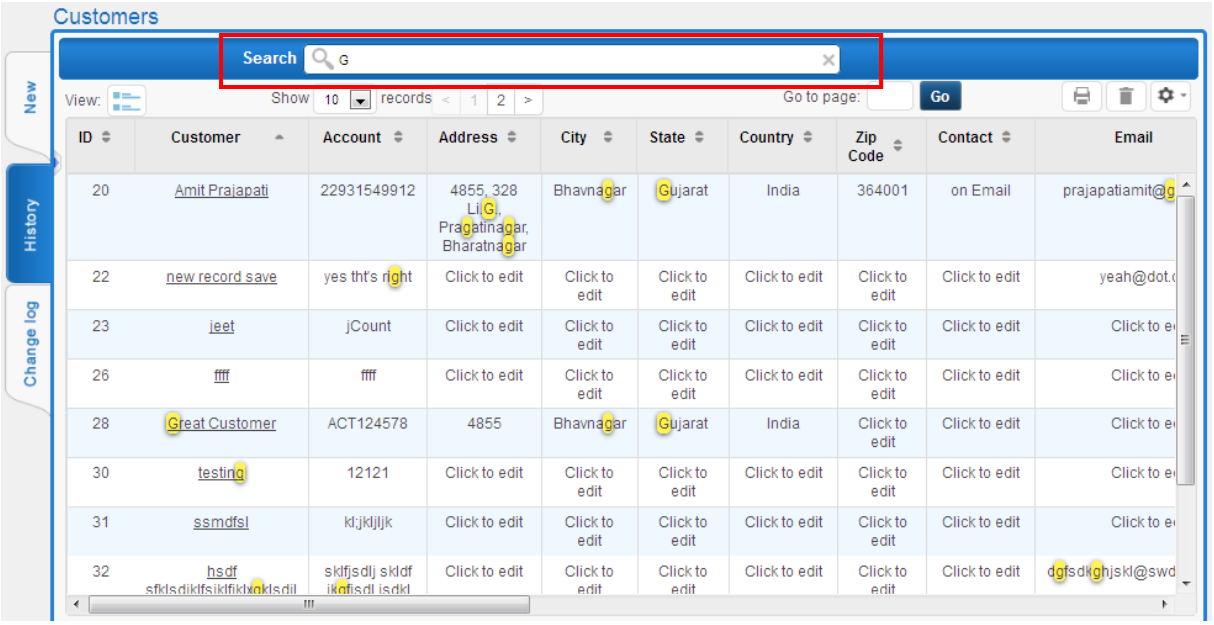
ID	History	Action	Customer	Account	Address	City	State	Country	Zip Code	Contact
20	24	update	Amit Prajapati	22931549912	4855, 328 Li.G., Pragatinagar, Bharatnagar	Bhavnagar	Gujarat	India	364001	on Email
20	23	update	Amit Prajapati	229315499	4855, 328 Li.G., Pragatinagar, Bharatnagar	Bhavnagar	Gujarat	India	364001	on Email
20	20	update	Amit Prajapati	229315499	4855, 328 Li.G., Pragatinagar, Bharatnagar	Bhavnagar	Gujarat	India	364001	on Email
20	19	update	Amit Prajapati	229315499	4855, 328 Li.G., Pragatinagar, Bharatnagar	Bhavnagar	Gujarat	India	364001	on Email
20	18	update	Amit Prajapati	22931549	4855, 328 Li.G., Pragatinagar, Bharatnagar	Bhavnagar	Gujarat	India	364001	on Email

2. General features

a. Search functionality

i. Main search

It enables user to search the specific page for any keyword. Enter the keyword in the Search dialog box. Searched field is highlighted and displayed in the list.

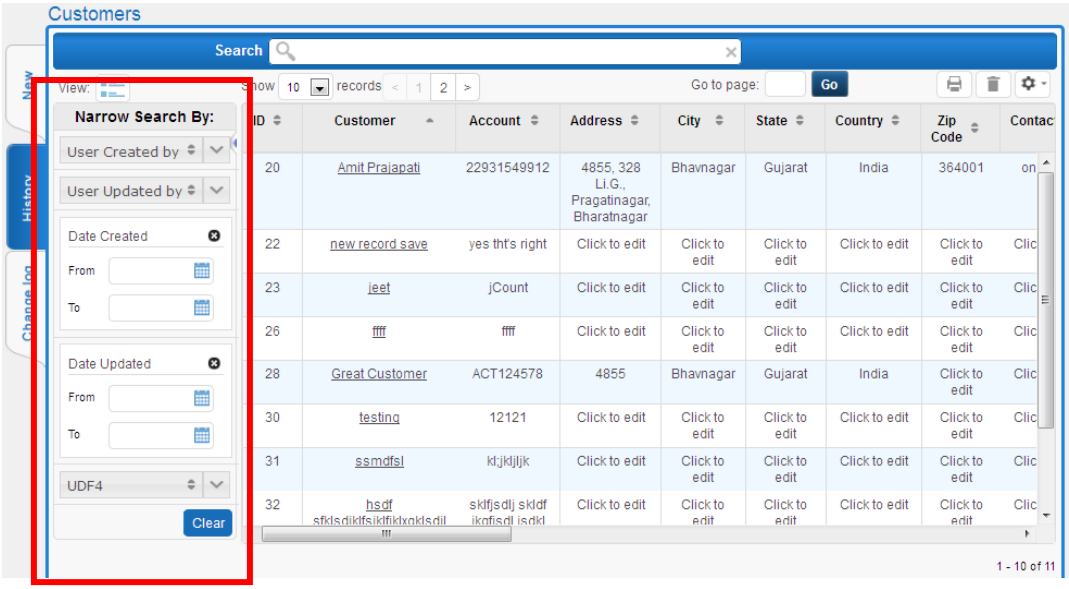


Note: Search functionality searches the keywords as you type. The fields with similar keywords get highlighted.

ii. Narrow Search By functionality

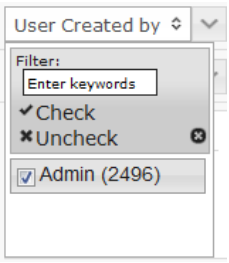
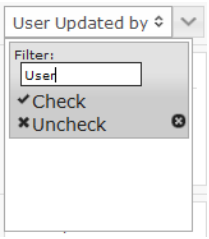
As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

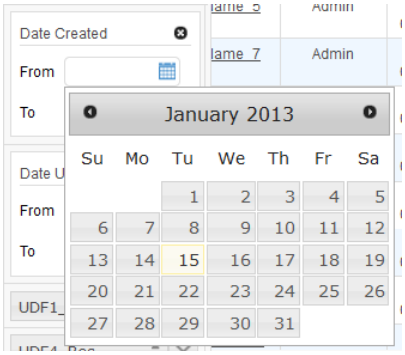
- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
- The following screen appears:



Note:

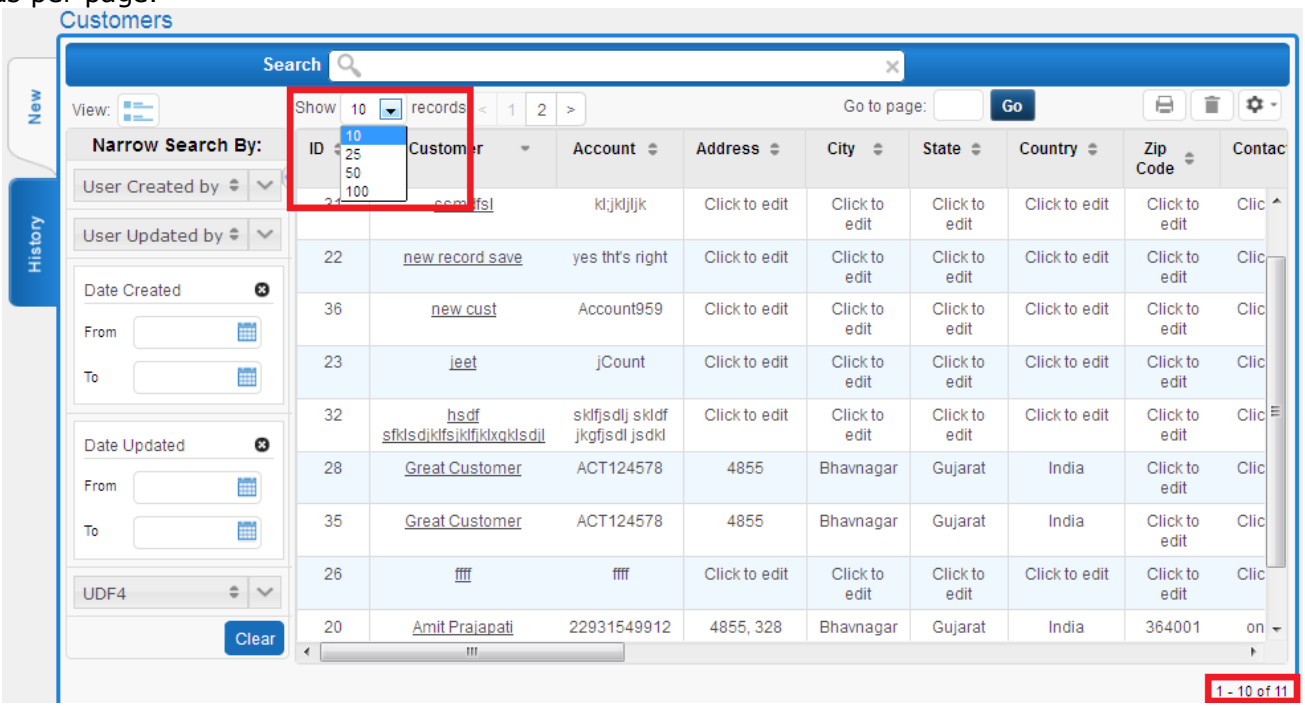
- At point of time only one of the either searches will work.
- Fields in narrow search may vary from module to module.

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 Clear

b. Show records Functionality

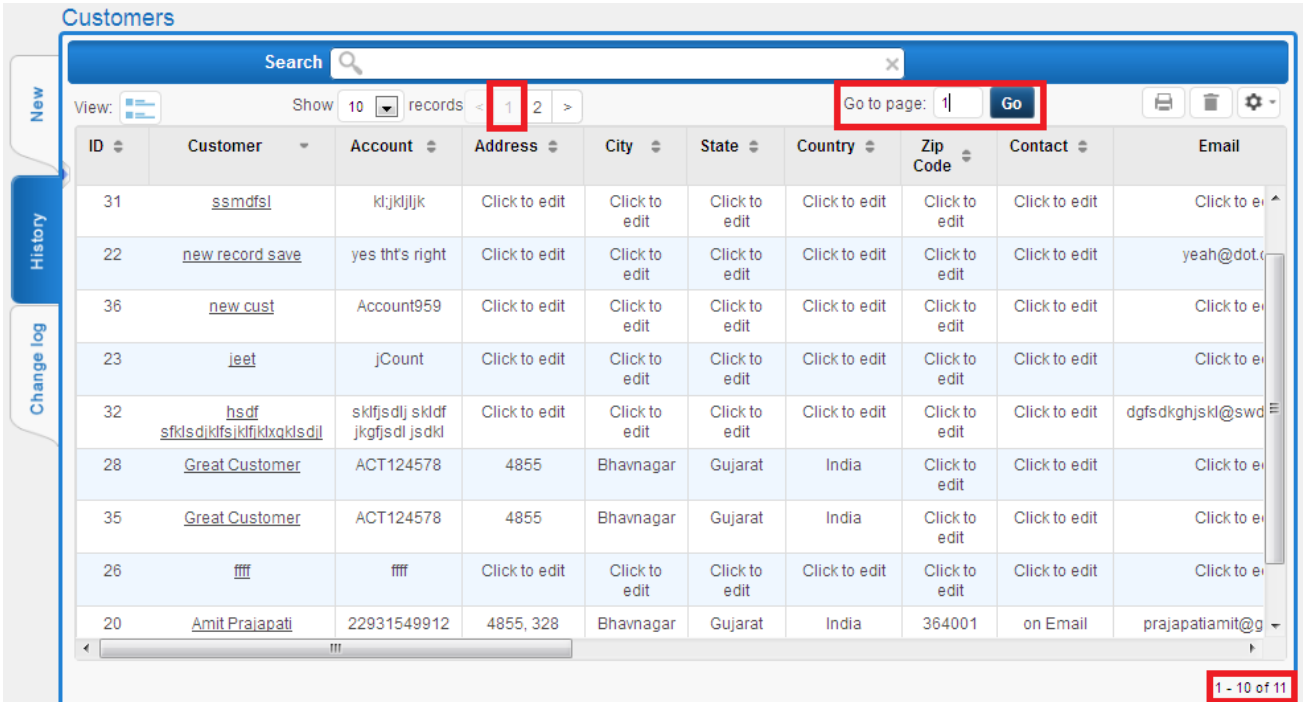
Show records functionality is dropdown option that enables user to view specified number of fields per page.



Note: Show records functionality enables user to select from 10, 25, 50 and 100 fields to be displayed per page.

c. Go To Page Functionality

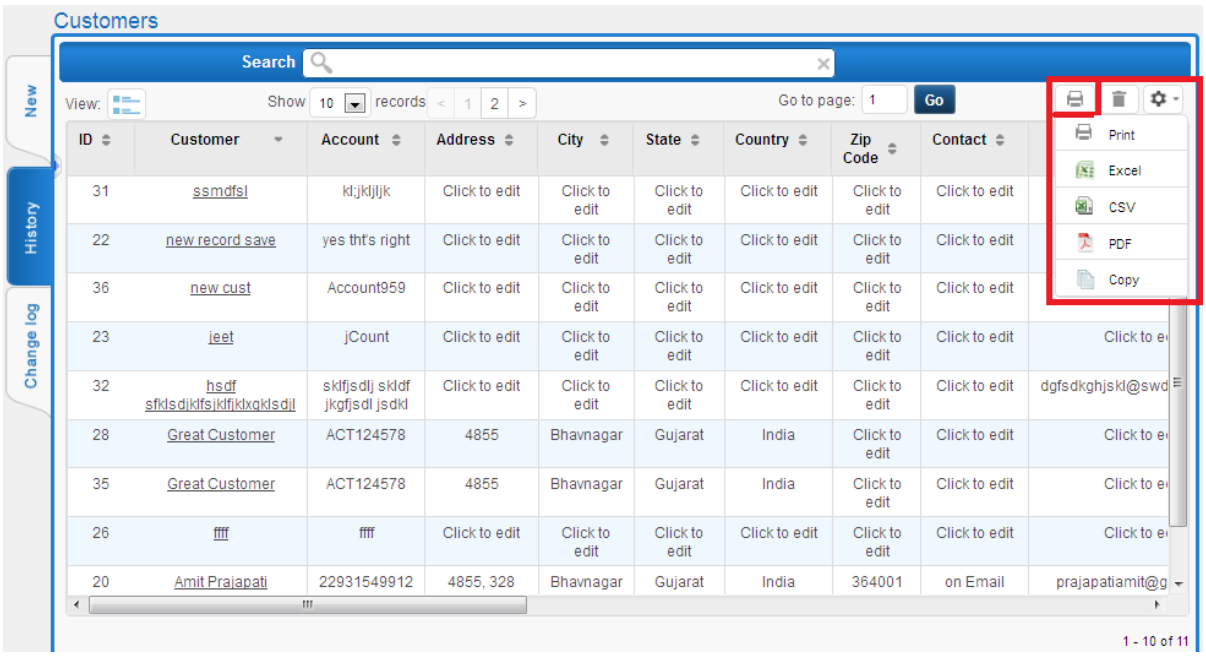
Go To Page functionality enables user to skip any specified page. Type the specified page number to view in the Go to page box and then click Go .The specified page is displayed on the screen.



d. Export Functionality

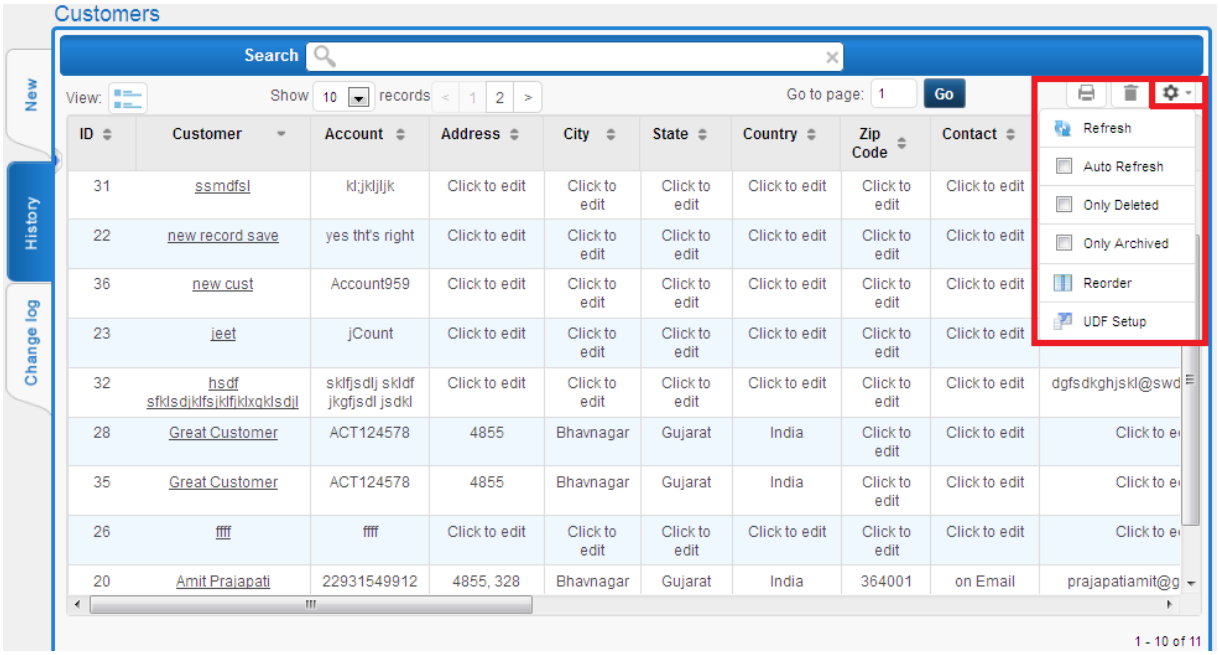
Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

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.

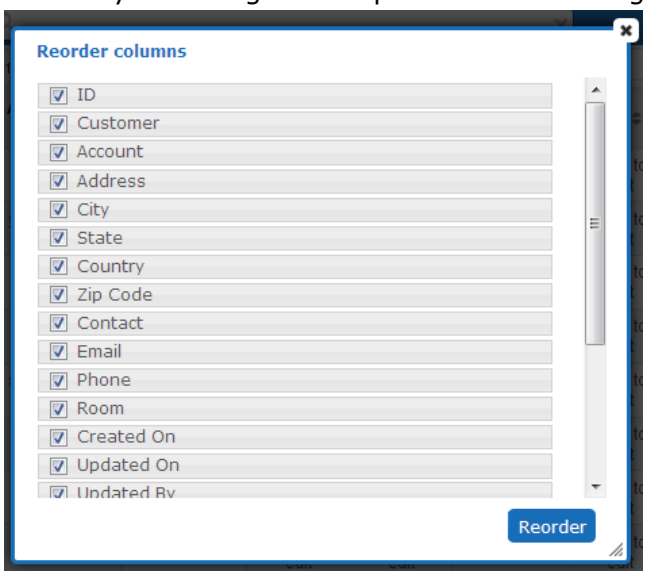


e. Settings functionality

Settings functionality enables user to perform various actions 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

Note: To cancel the selection, click

3. Miscellaneous

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