eTurns

Work Orders

Help documentation

Contents

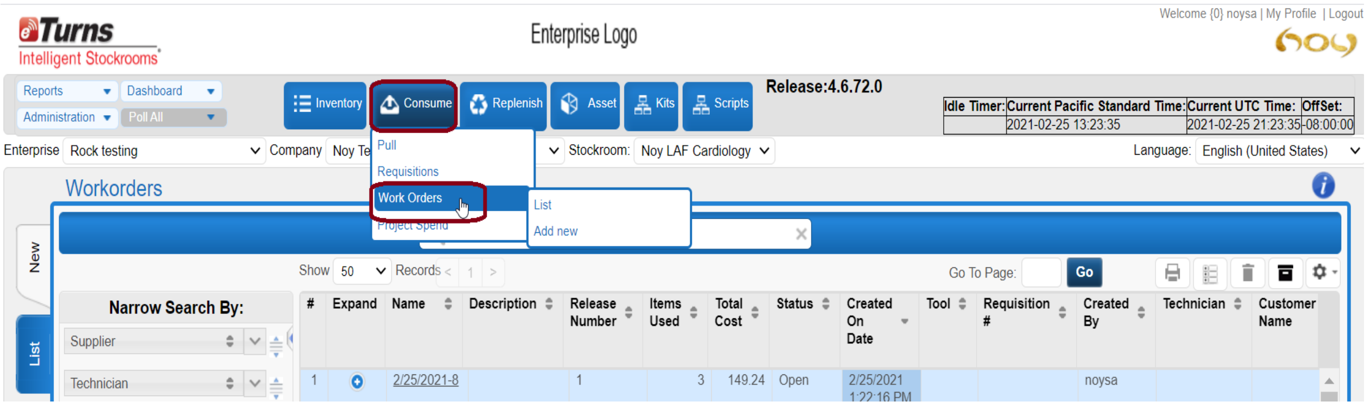
A Work Order is a collection of pulls and can consist of Item(s), Kit(s) or Labor (hours) grouped together to be pulled on a Work Order. Use a Work Order to group together multiple pull transactions. This is useful in identifying a group of pulls for billing purposes or grouping pulls based on a job.

1. Create a Work Order - Quick Reference Guide

Point the mouse over Consume and click on Work Order. Click on the New tab.

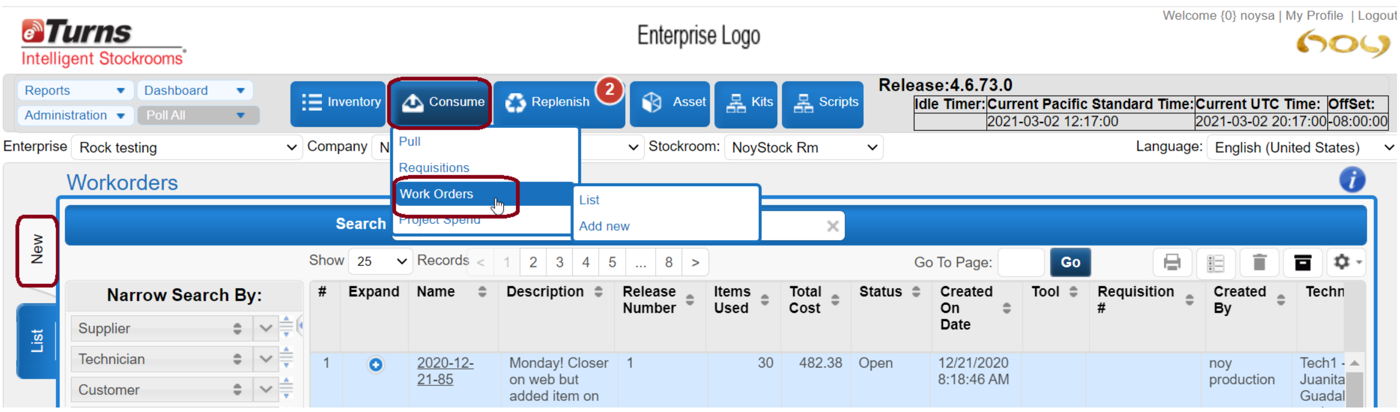
- Click Save (retaining all default selections).
- Highlight row(s) of item(s) or Search for item(s).
- Change quantity to pull if applicable.
- Click Pull or Pull All.
- Click OK.
- Click Close.
- Click Save.

A Work Order has been created.

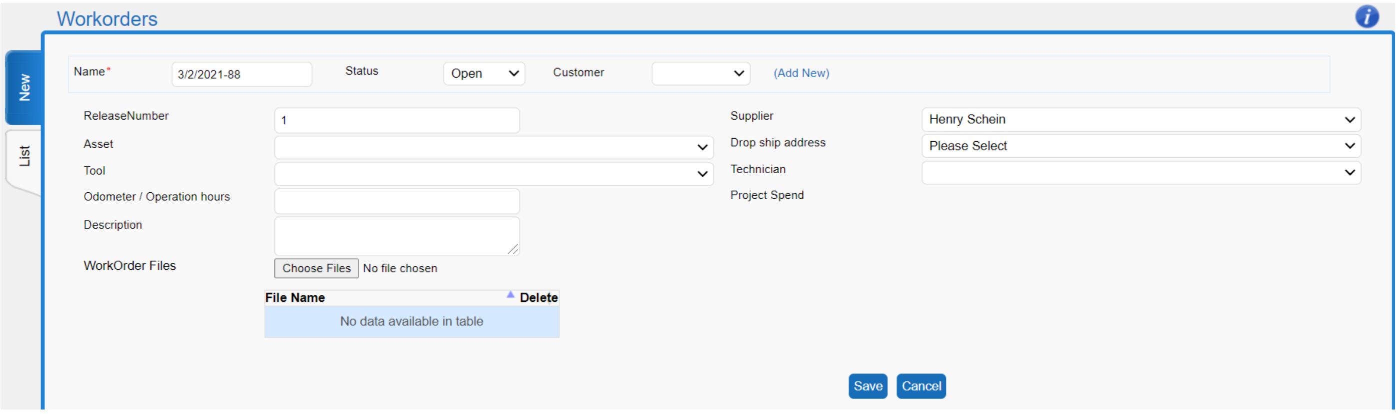


2. Create a Work Order – with General Details

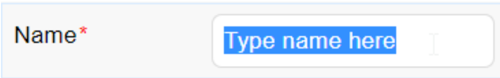
Point the mouse over Consume and click on Work Order. Click on the New tab.



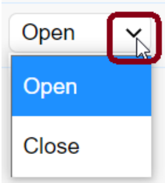
- The Work Order header will be displayed.



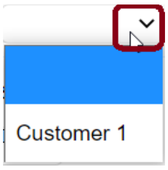
- Enter or select the fields that are applicable and then click the "Save" button.
  a. **Name** – the name of the Work Order is usually in a date format and is setup in the Suppliers page. To change the name, type the preferred name to identity the Work Order. If duplicate Work Order names are allowed in the Supplier setup page, it will be differentiated by the Release Number.

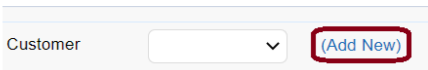


  b. **Status** – the status of the Work Order can either be Open or Close. Additional item(s) can be added to an open work order, not a closed one. Click on the drop-down arrow to choose the Work Order status.

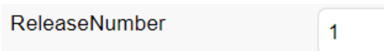


  c. **Customer** – if the Work Order pertains to a customer, click on the drop-down arrow and choose the customer. Customers are setup under the Supporting Information module or click *Add New* to create a new customer.

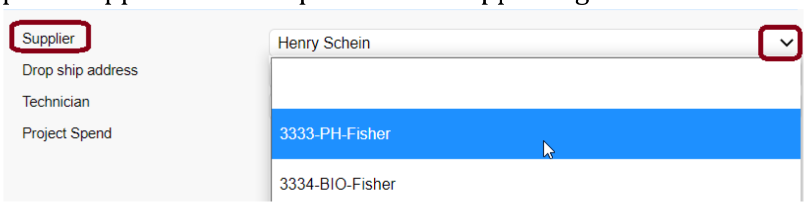




  d. **Release Number** – is the unique identifier assigned by the software to distinguish between Work Orders regardless of the Work Order name.

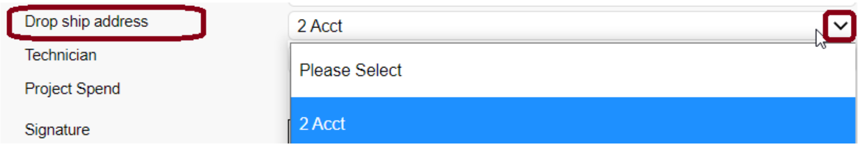


  e. **Supplier** – if the Work Order pertains to a Supplier, click on the drop-down arrow and choose the Supplier. Suppliers are setup under the Supporting Information module.

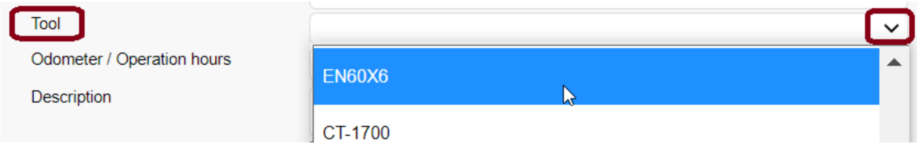


f. **Asset** – if the work order pertains to an Asset (such as a vehicle or a truck), click on the drop-down arrow and select the asset. Assets are setup in the Asset module.

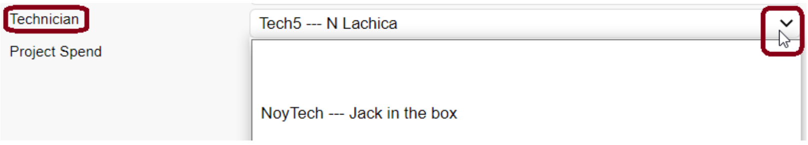
g. **Drop ship Address** – click on the drop-down arrow to select a Drop Ship Address (if applicable). This is the drop ship address of the Supplier for the Work Order.



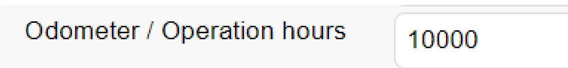
h. **Tool** – if the work order pertains to a Tool, click on the drop-down arrow and select a tool. Tools are setup in the Asset module.



i. **Technician** – if the work order is assigned to a technician, click on the drop-down arrow and select the technician. Technicians are setup under the Supporting Information module.

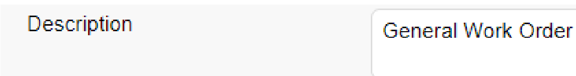


j. **Odometer/Operation Hours** – enter the odometer reading for an Asset (such as a vehicle or truck) or the operation hours of a tool, if applicable.



k. **Project Spend** – if a work order is linked to a project spend limit.

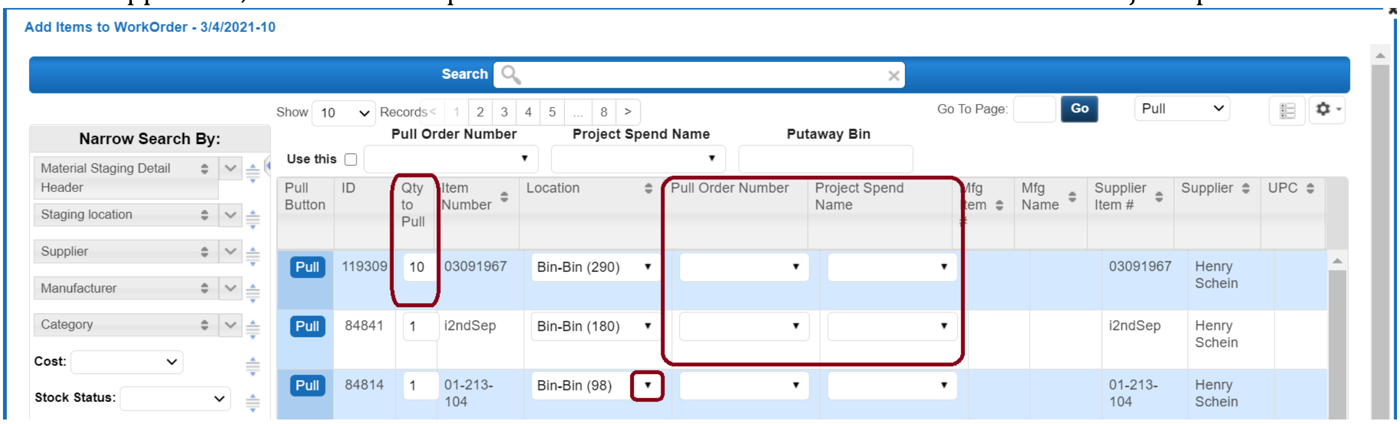
l. **Description** – text field to describe the work order.



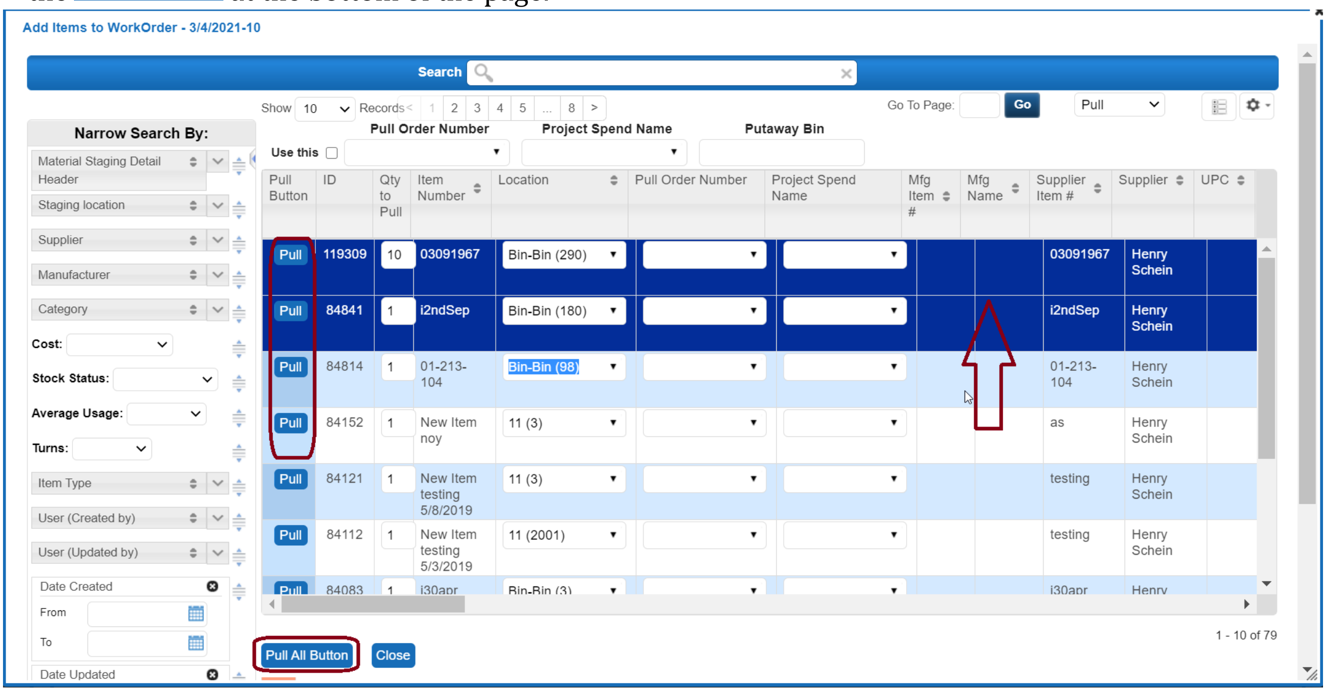
m. **Work Order Files** – attach a file related to the work order by clicking on the Choose Files button.

n. **Signature** – signature capture in the phone app is displayed in the work order header.

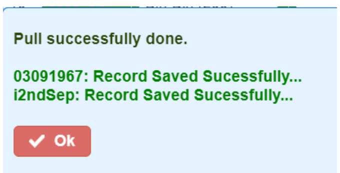
- Click Save, the “Add Items to Work Order” page will display.
- Enter the Qty to Pull if different from the default pull quantity.
- If applicable, click on the drop-down arrow to the select a different Bin Location.
- If applicable, click on the drop-down arrow to choose the Pull Order Number or Project Spend Name.



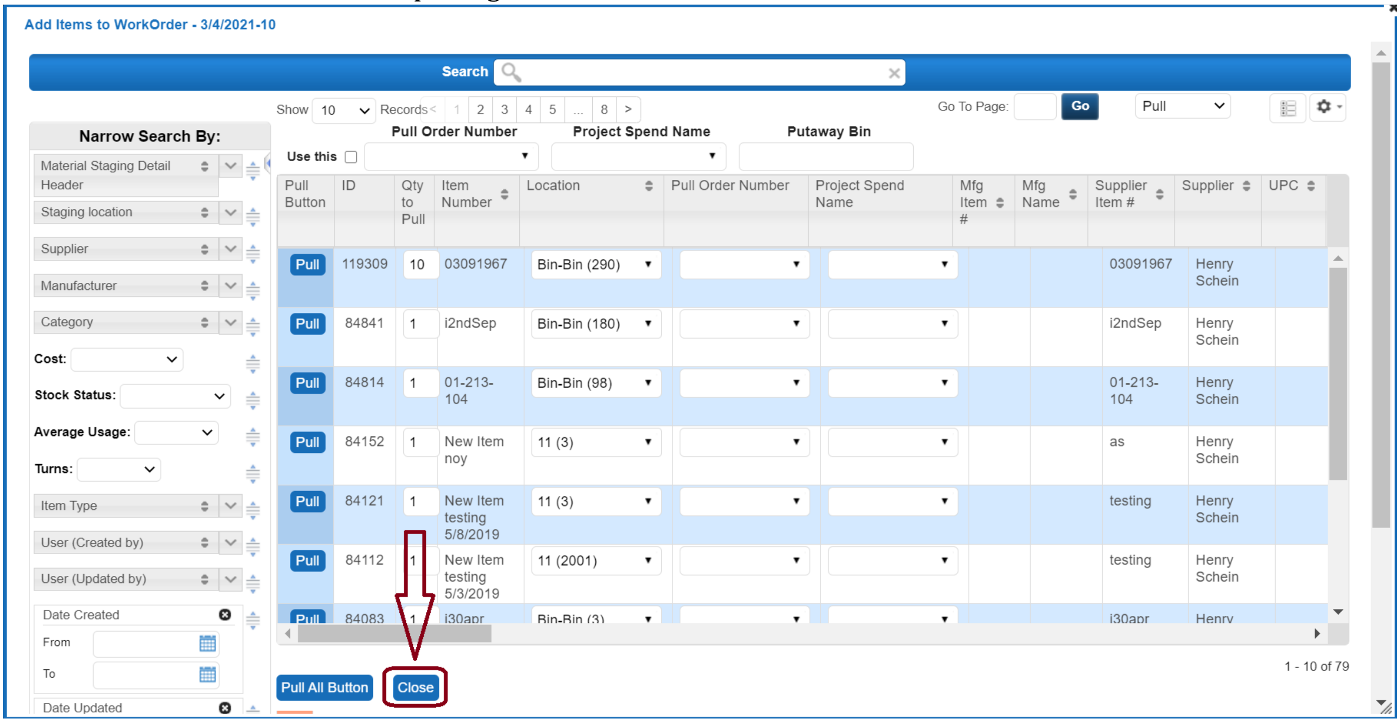
- Click on the Pull button for each item or click on each row (highlighted in dark blue color) and clicking the Pull All Button at the bottom of the page.



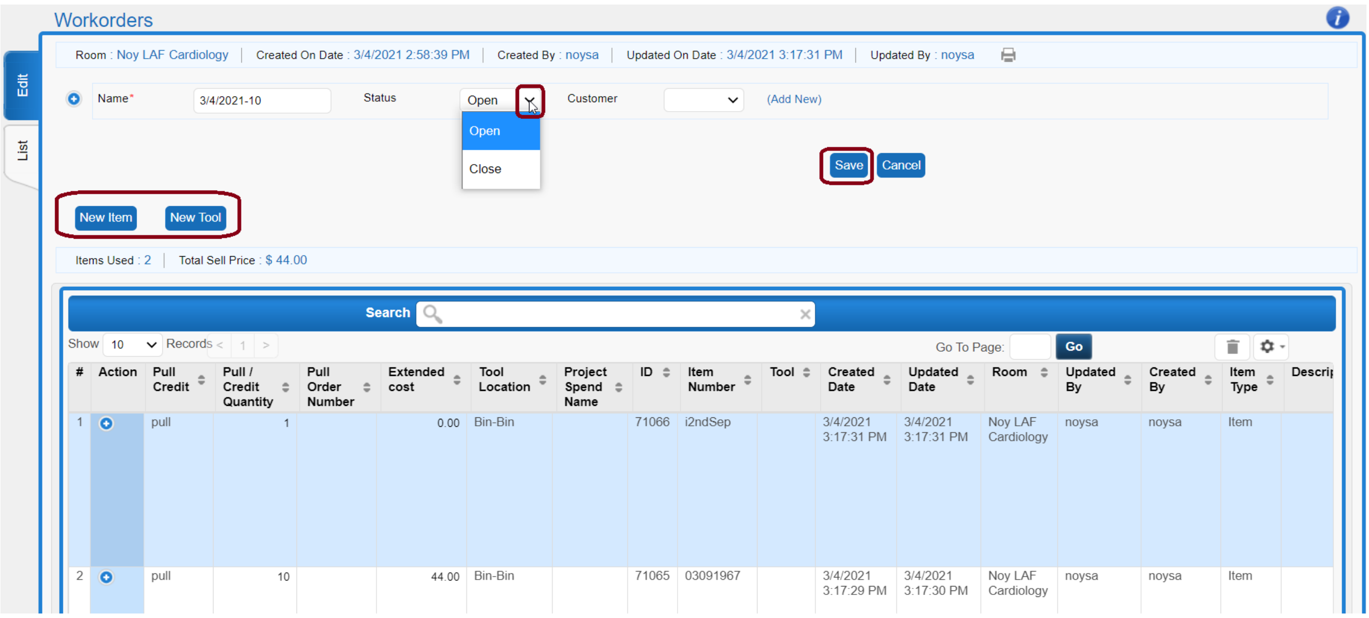
- Click “OK”.



- Click Close, when done pulling all the items needed for the Work Order.

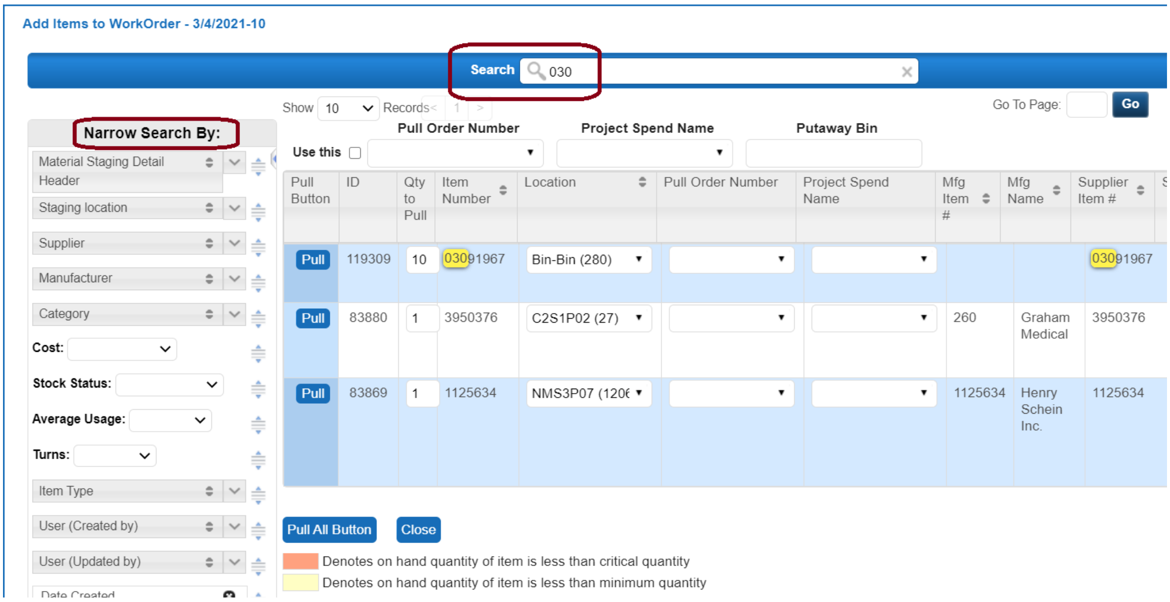


- The Workorders page will be displayed with the number of Items pulled.
- The add additional items or a toll click on New Item and New Tool respectively.
- Click on the drop-down arrow to Close the Work Order (no additional items can be added unless it's unclosed).
- Click Save.



3. Search for Items to Pull

If the item(s) to be pulled is not displayed on the page, type the keyword(s) in the search field. The keyword(s) search results are highlighted in yellow and filtered after the third character is typed. Users may combine the narrow search with the (main) search function.

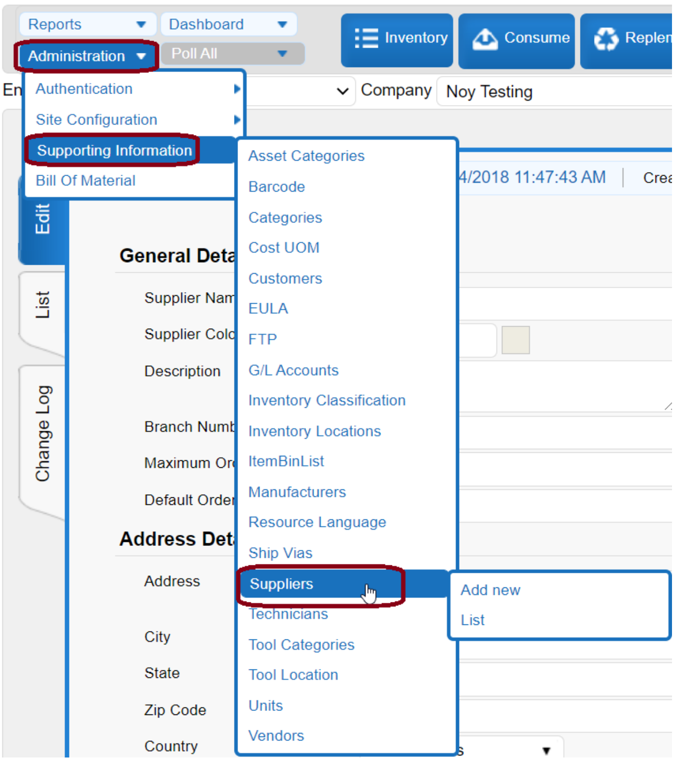


Note: See #17 *Search Pull Page* for extensive instructions about the search function.

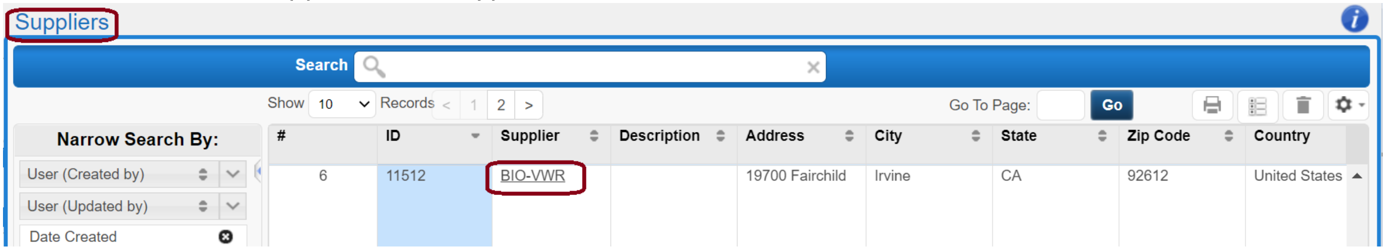
4. Pull Order Number

The Pull Order Number is used for billing consigned pulls to a particular Pull Order Number for a Supplier.

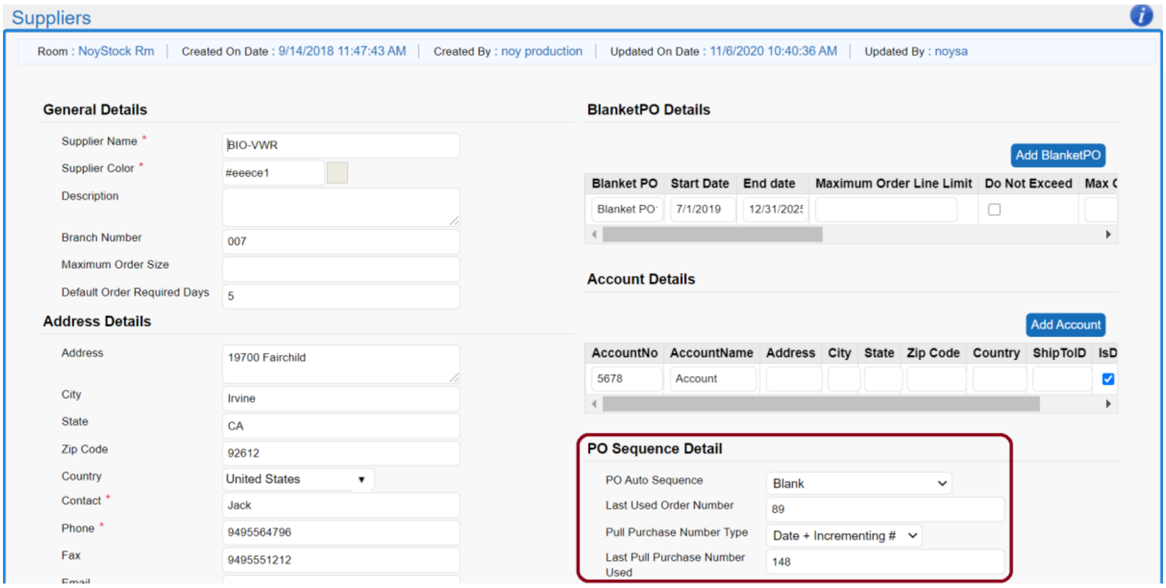
- The Pull Order Number is set in the Supplier PO Sequence Detail. To setup, point the mouse over ***Administration***, to ***Supporting Information*** and click on ***Suppliers***.



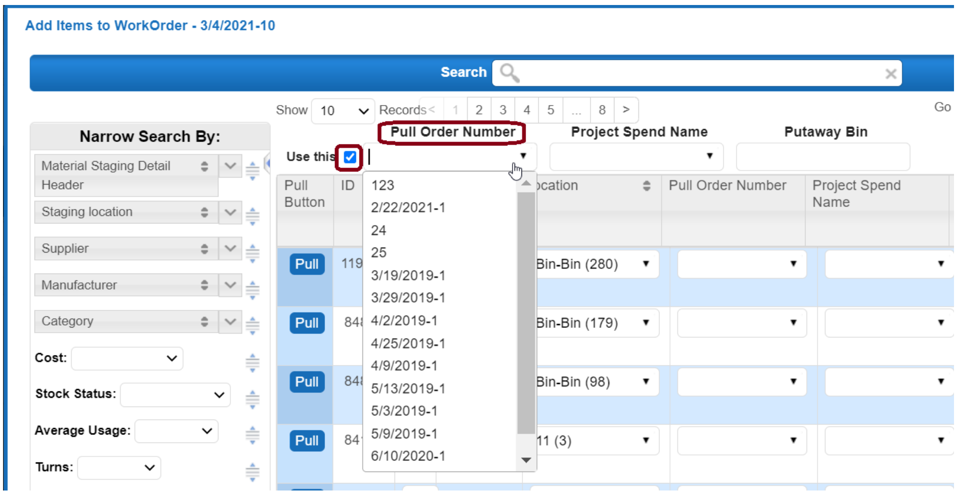
- The list of Suppliers will be displayed.
- Click on the Supplier name hyperlink.



- The Supplier page will be displayed.
- Set the PO Sequence. This will be the format of the PO (Purchase Order) Number.

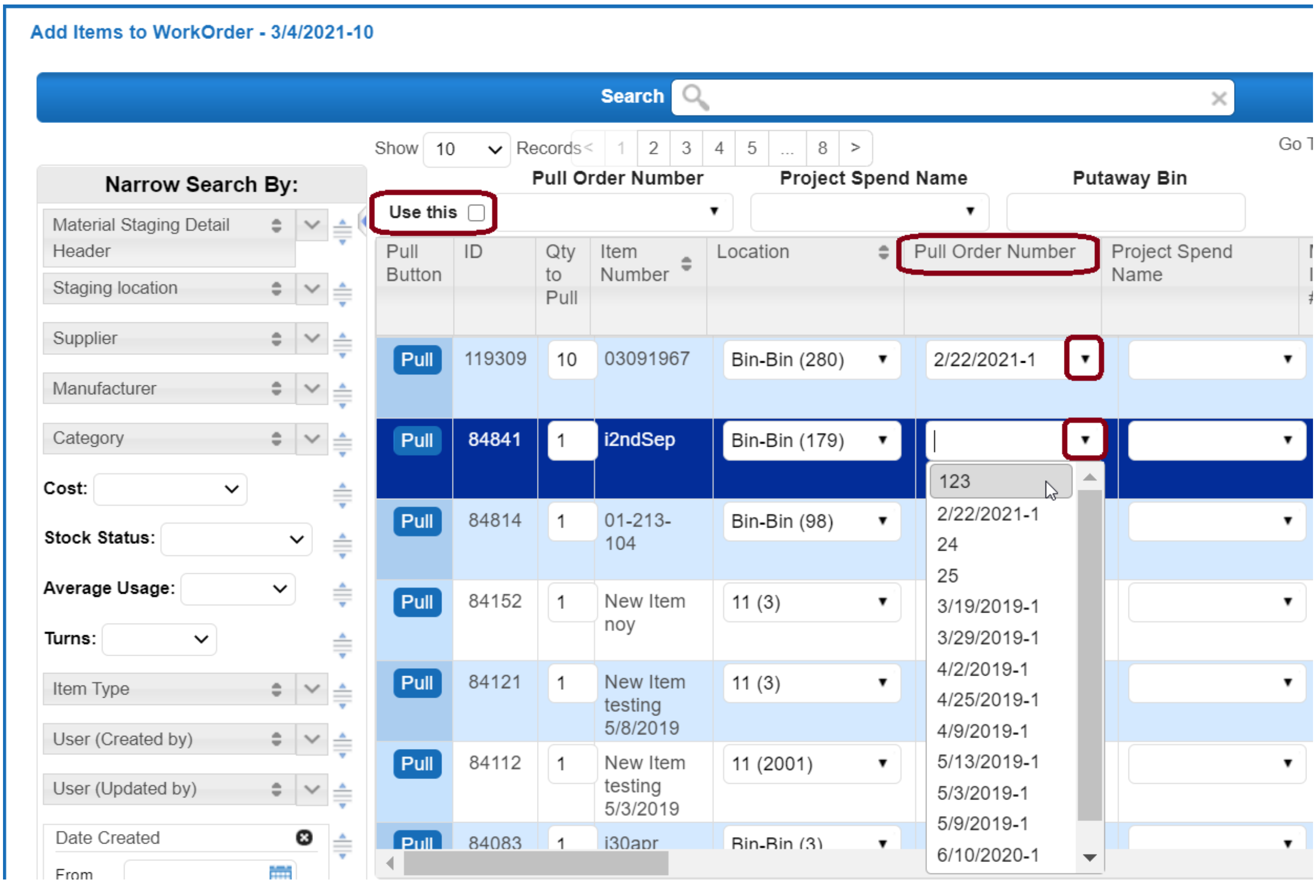


- In the Pull page check the box "***Use this***" and choose the Pull Order Number. This will be the Pull Order Number that will be used for all the pulls.



Note: When the box is checked "*Use This*" all Pull transactions will use the selected Pull Order Number. There can only be one Pull Order Number chosen at a time.

- To choose a different Pull Order Number for each pull, do <u>not</u> check the box "*Use This*".
- Click on the drop-down arrow for the Pull Order Number field and choose the appropriate Pull Order Number that the consigned pulls will be billed to.

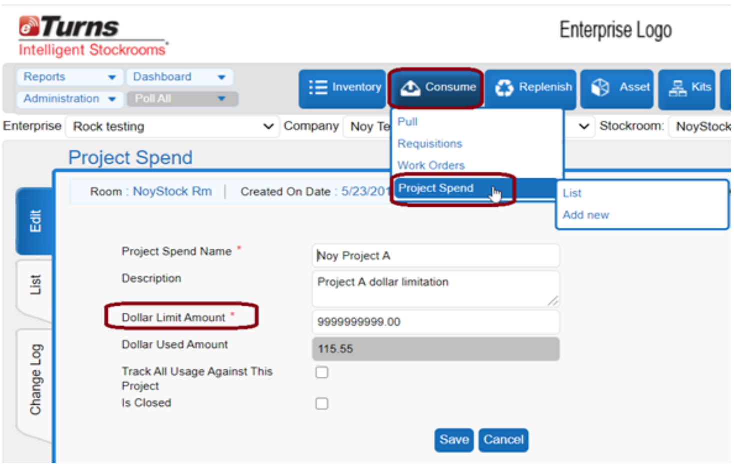


5. Project Spend

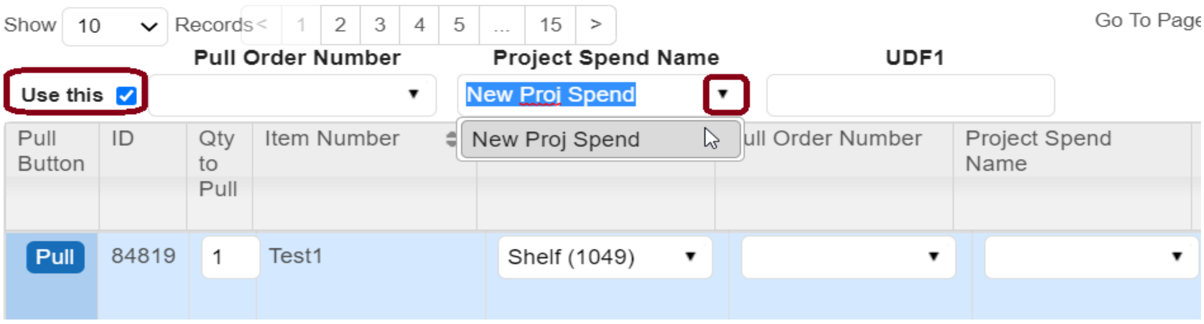
The cost of Pulling items can be associated with a Project Spend, which will limit the number of items pulled once the set dollar limit is reached. It is used to budget or limit the dollar amount associate with the cost of pulling items, then restricts the number of items Pulled based on the dollar limit. The limit can also be based on the number of items or quantities pulled.

To setup Project Spend, point the mouse over ***Consume*** and click on ***Project Spend***. Enter the pertinent data and save.

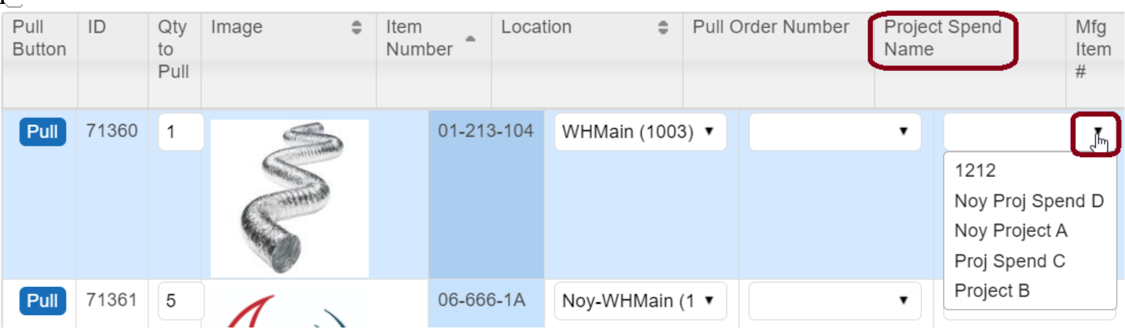
- ***Note***: When the box is checked "*Track All Usage Against This Project,*" all Pull transactions will use this project spend limit.
- There can only be one "Track All Usage Against This Project" (Project Spend) chosen at a time.
- For more detailed information, see Project Spend module help documentation.



- In the Pull page check the box "***Use this***" and choose the Project Spend in the drop-down menu. This will be the Project Spend that will be used for all the pulls.

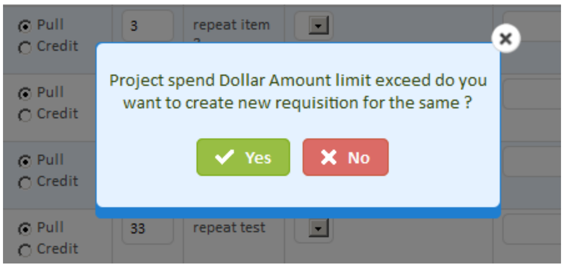


- To choose a different Project Spend for each Pull, click on the drop-down menu for a specific item to pull.

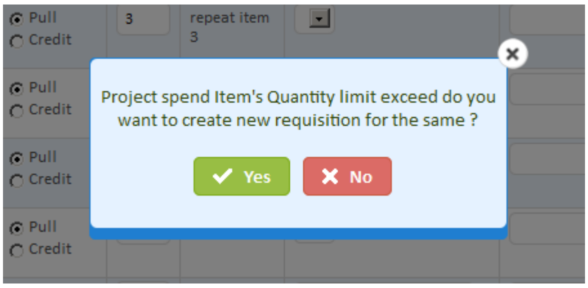


Note: For Project Spend, the limit will either be the number of Quantities pulled or the Dollar amount, whichever comes first.

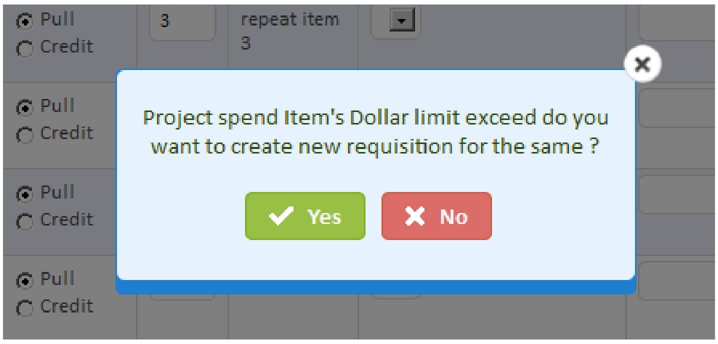
a. **Project Level Amount Restriction**: If the pulled items exceed the Dollar amount limit defined in the Project spend, this restriction appears on screen: "Project spend Dollar Amount limit exceed do you want to create new requisition for the same?"



b. **Project Spend Item's QTY**: If the pulled items exceed the quantity limit in the Project Spend, then this message appears on screen: "Project spend Item's Quantity limit exceed do you want to create new requisition for the same".

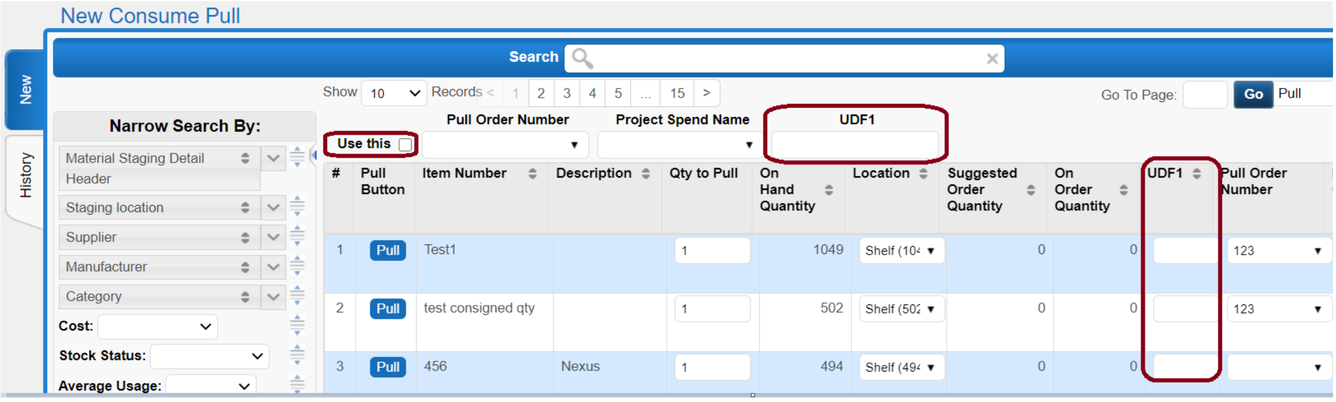


c. **Project Spend Item's Dollar Amount**: If the pulled items exceed the amount assigned to a specific item in the Project Spend, then this message appears on screen: "Project spend Item's Dollar limit exceed do you want to create new requisition for the same".

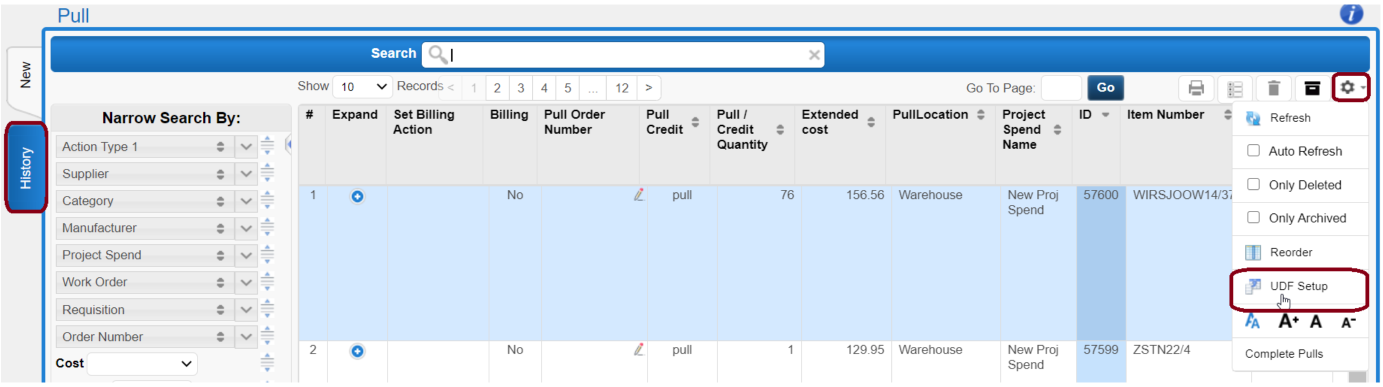


6. Using UDF's for Work Order Pulls

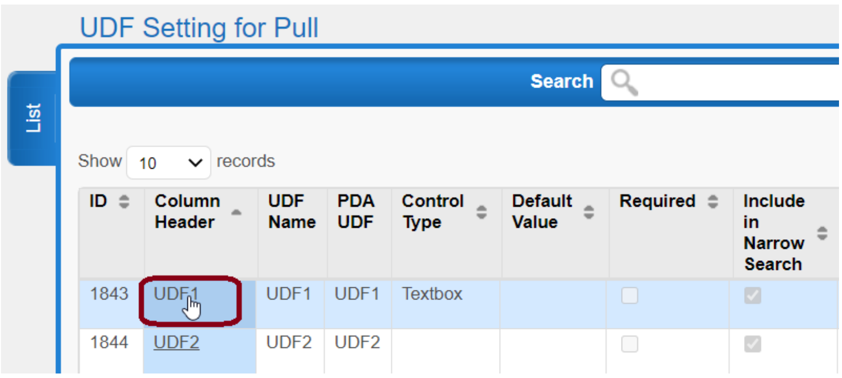
Set up to 10 User Defined Fields (UDF's) to further describe the Pull transactions. UDF's can be setup to be required for a pull transaction and can also be available in the "*Use This*" option and for each Pull transaction.



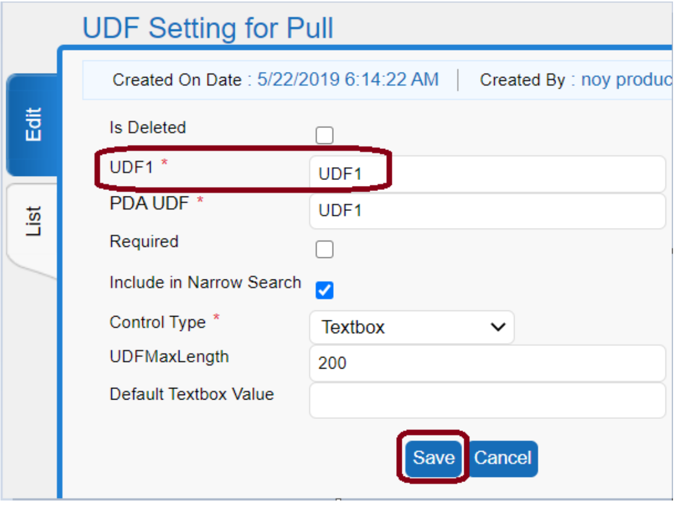
- To setup, click on the History tab in the Pulls page.
- Point the mouse over the Wheel ⚙ icon and click on UDF Setup.



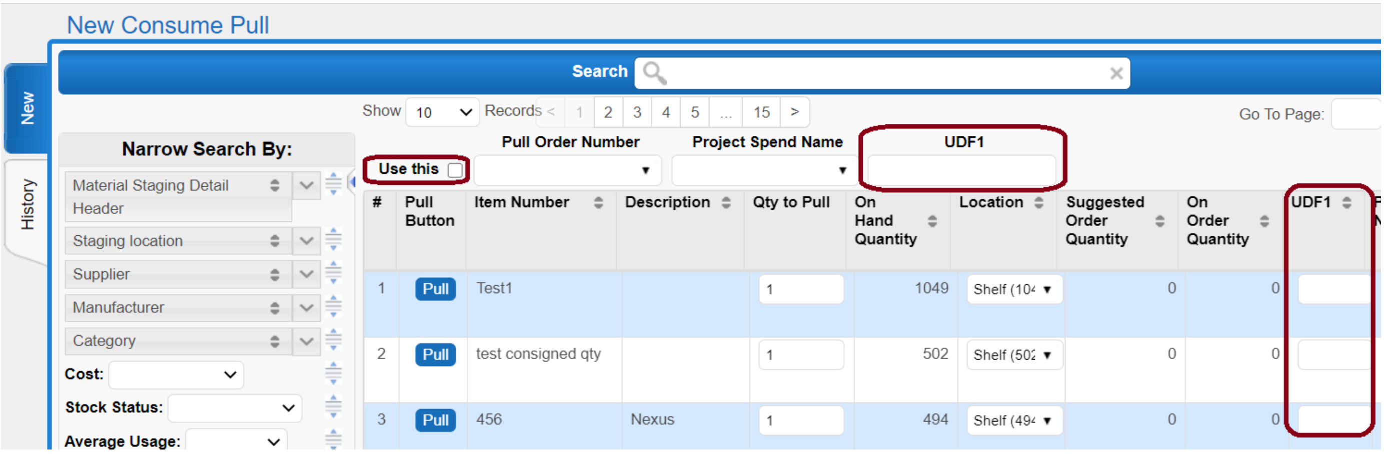
- The UDF Setting for Pull page will be displayed.
- Click on the UDF hyperlink.



- Click on the UDF column header name to define the UDF and save.
- To require the UDF for each Pull transaction, check the box "Required".



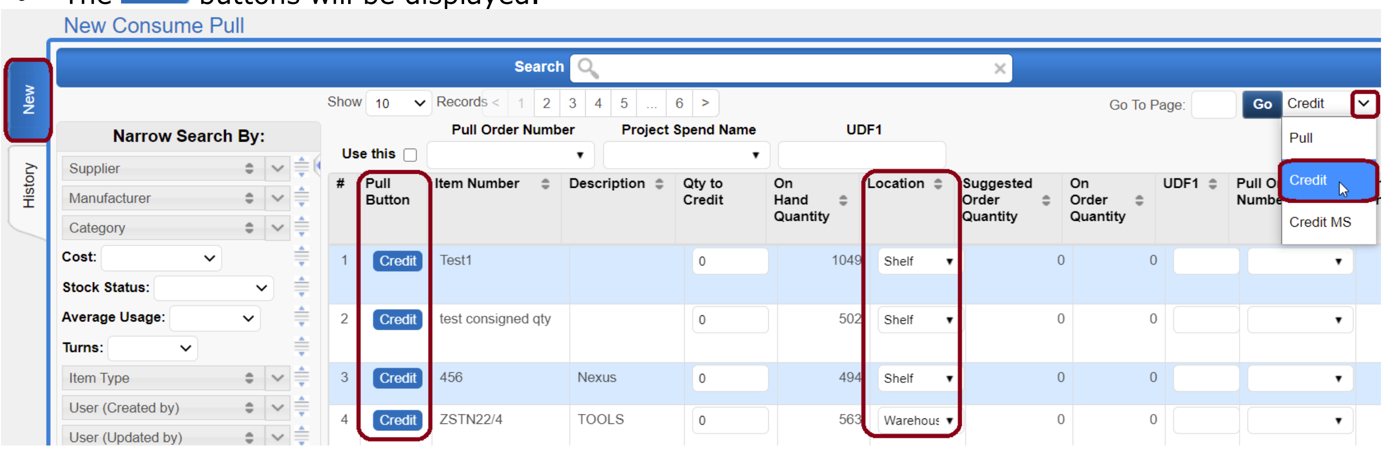
- The UDF will be displayed in the New Consume Pull page and available for use.



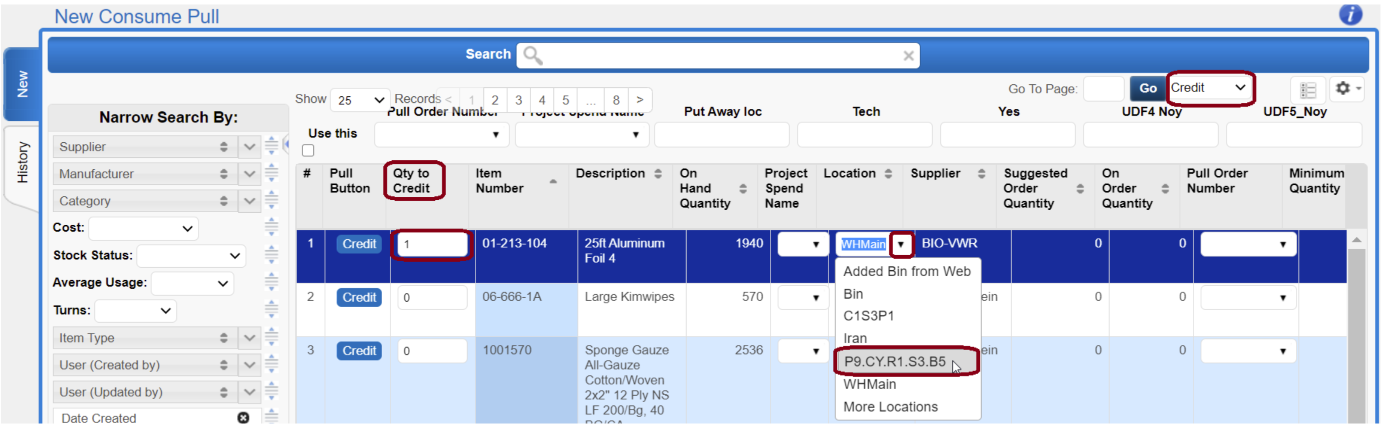
7. Credit Pull

A Credit Pull is putting back the items that were pulled, with its quantities, back to general inventory.

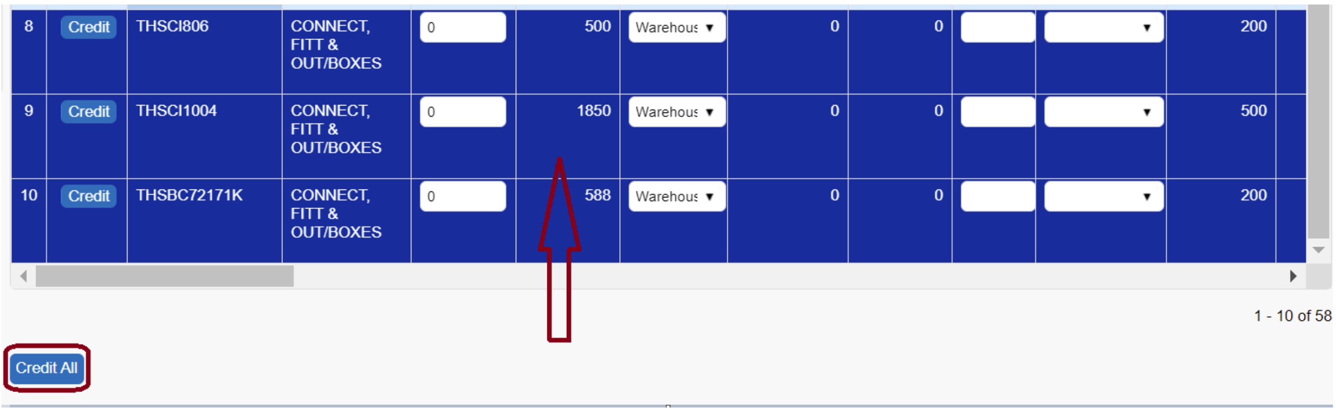
- In the New Consume Pull page, click on the drop-down menu and choose Credit.
- The Credit buttons will be displayed.



- Enter the quantities to Credit and the Inventory location (if different from the default bin location).
- Click the "Credit" button to credit the item(s).



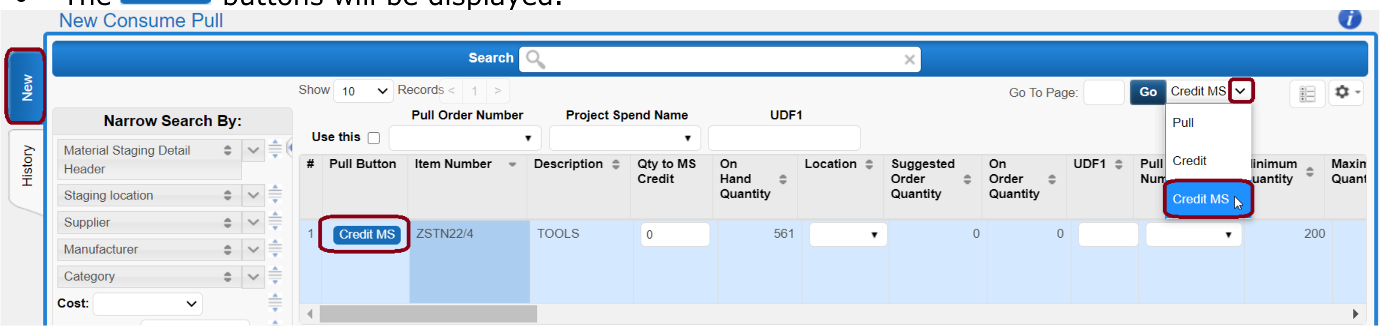
- There is an option to credit multiple items at once by clicking on each row (highlighted in dark blue color) and clicking the Credit All button at the bottom of the page.



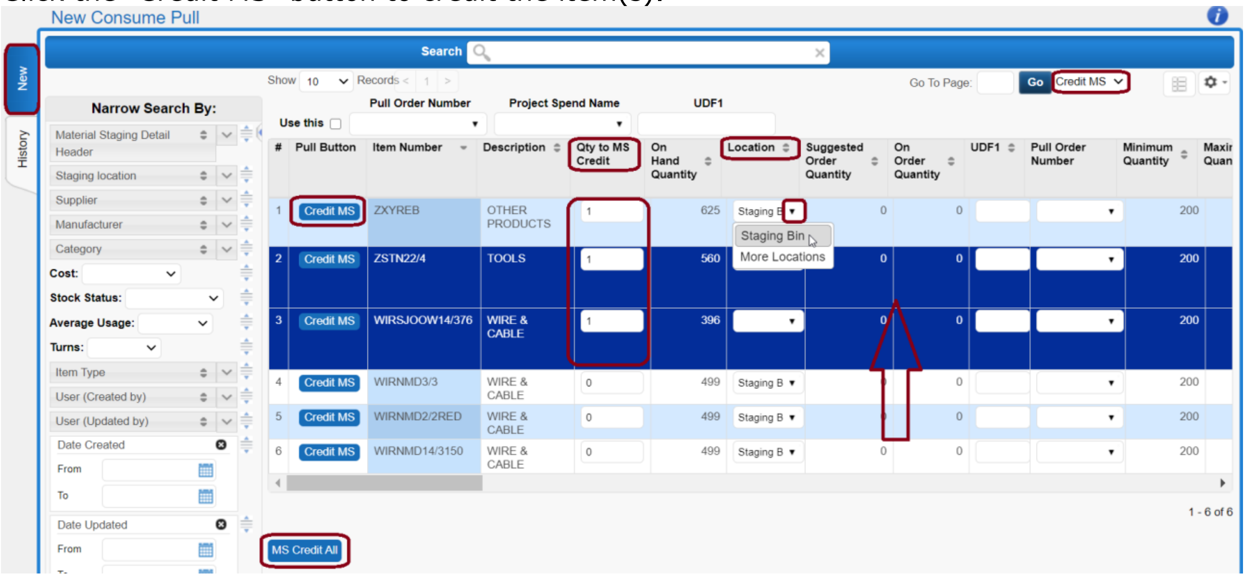
8. Credit Material Staging

Credit Material Staging is putting back the items that were pulled from a Material Staging, with its quantities, back to general inventory.

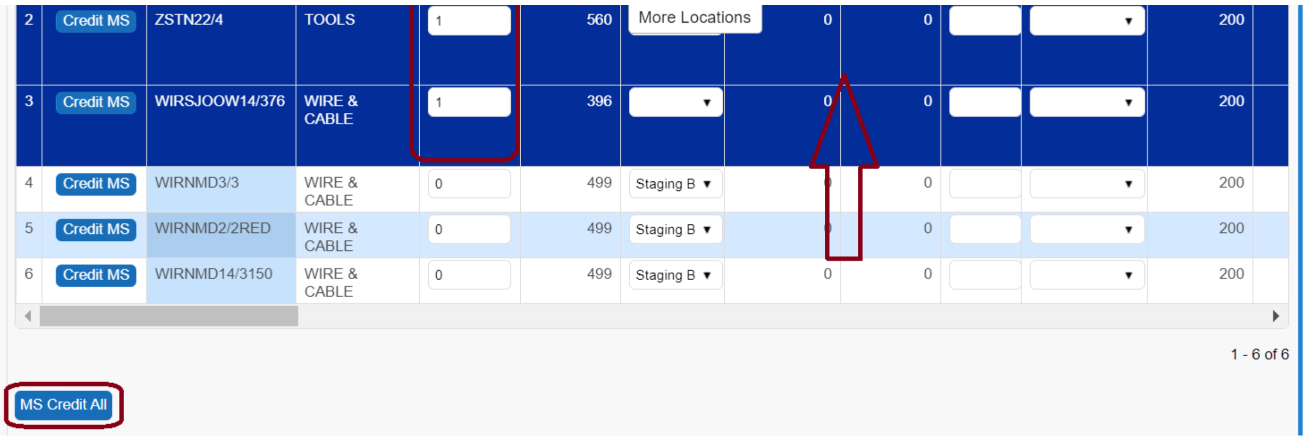
- In the New Consume Pull page, click on the drop-down menu and choose Credit MS.
- The Credit MS buttons will be displayed.



- Enter the quantities to Credit and the Inventory location (if different from the default bin location).
- Click the "Credit MS" button to credit the item(s).



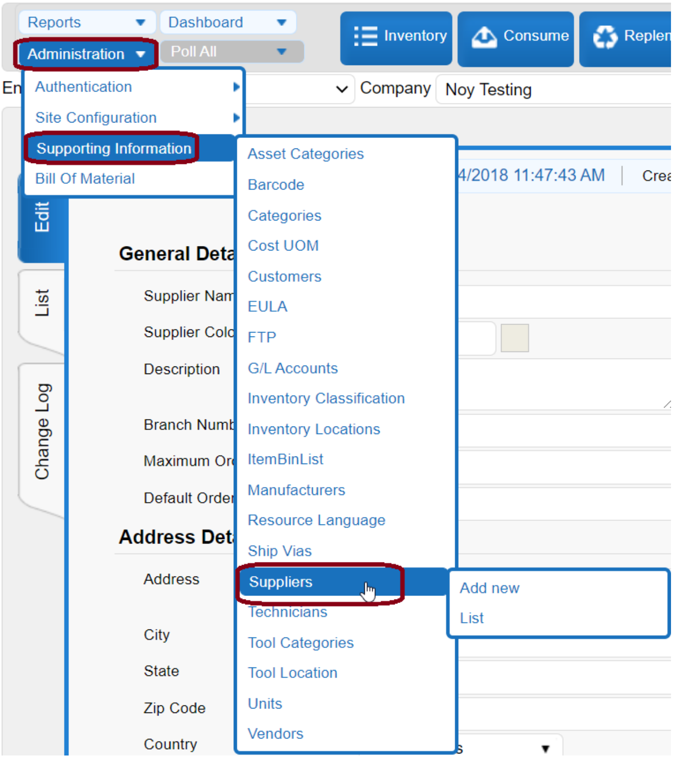
- There is an option to credit multiple items at once by clicking on each row (highlighted in dark blue color) and clicking the MS Credit All button at the bottom of the page.



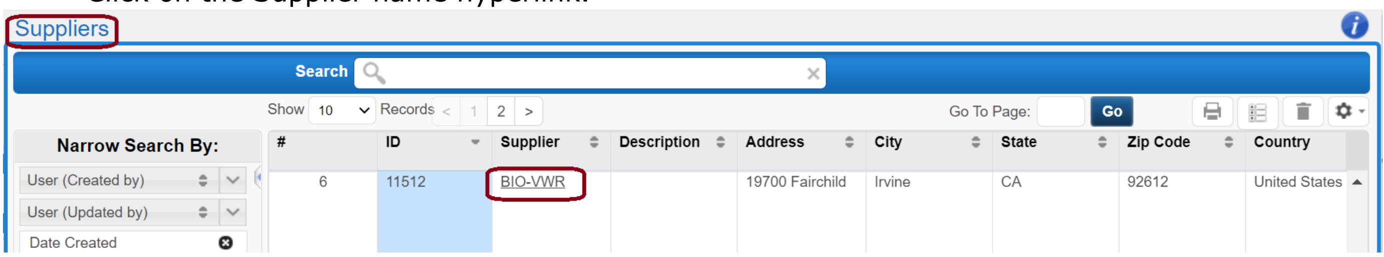
9. Supplier Account Number

The Supplier Account Number is used for billing pulls to a particular Account Number for the Supplier.

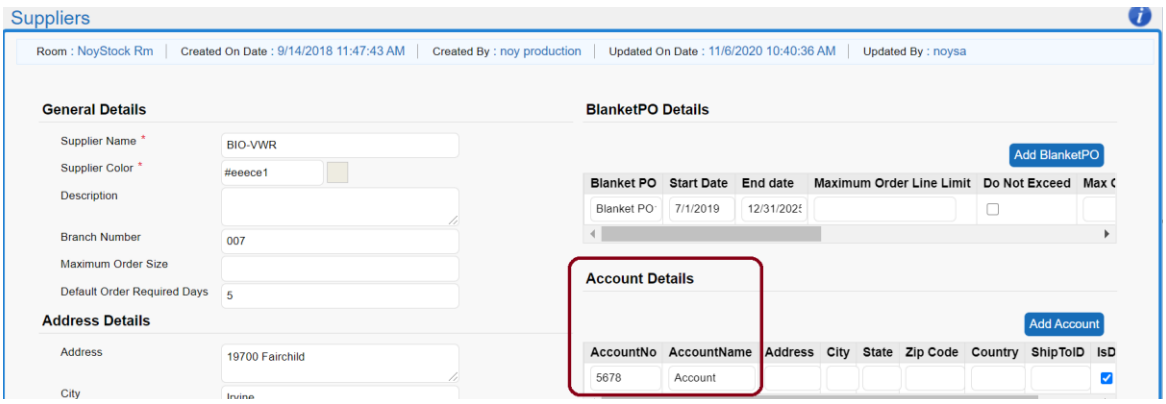
- The Supplier Account Number is set in the Supplier Account Details. To setup, point the mouse over ***Administration***, to ***Supporting Information*** and click on ***Suppliers.***



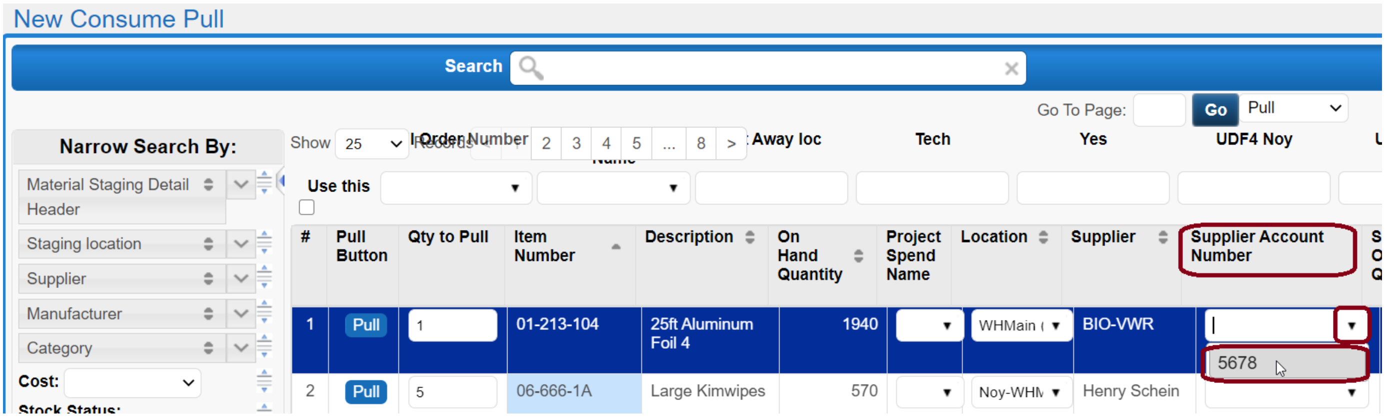
- The list of Suppliers will be displayed.
- Click on the Supplier name hyperlink.



- The Supplier page will be displayed.
- Set the Supplier Account Number in the Account Details section.

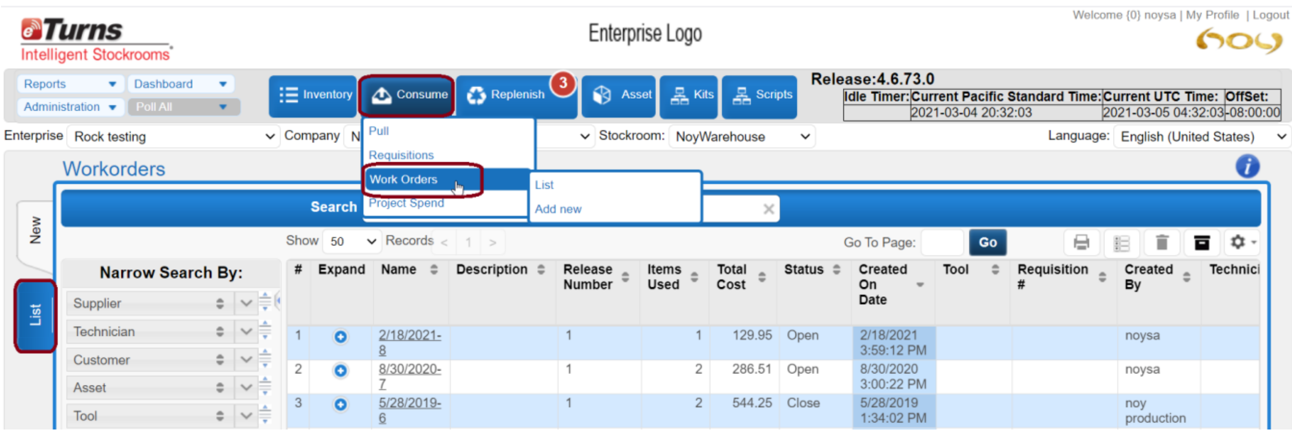


- In the Pull page, click on the drop-down menu and choose the Supplier Account Number. This will be the Account Number that will be used for billing for the pull(s) transaction.

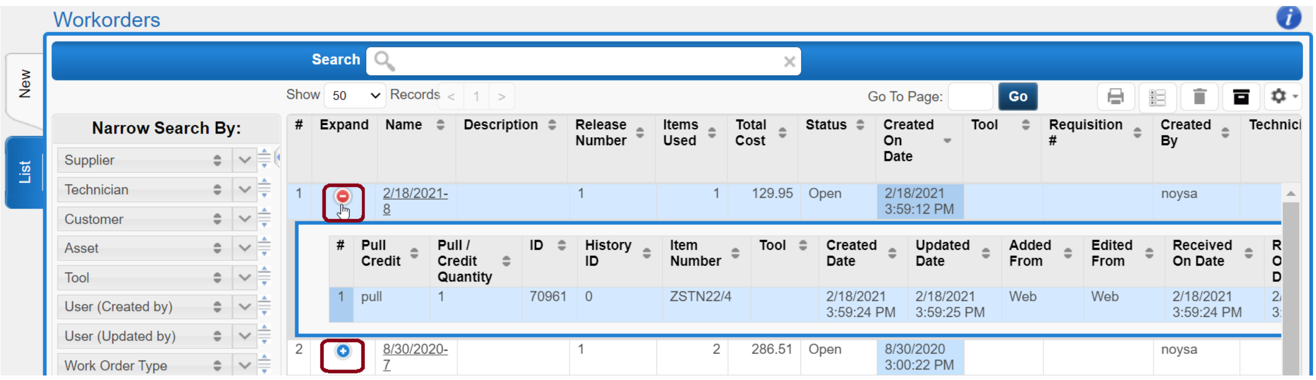


10. History of Work Orders

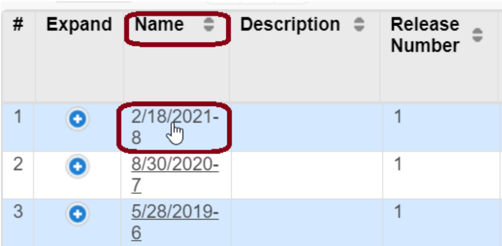
To open the History of Work Orders, point the mouse over Consume and click on Work Order. This opens the List Tab, or the list of existing historical Work Orders.



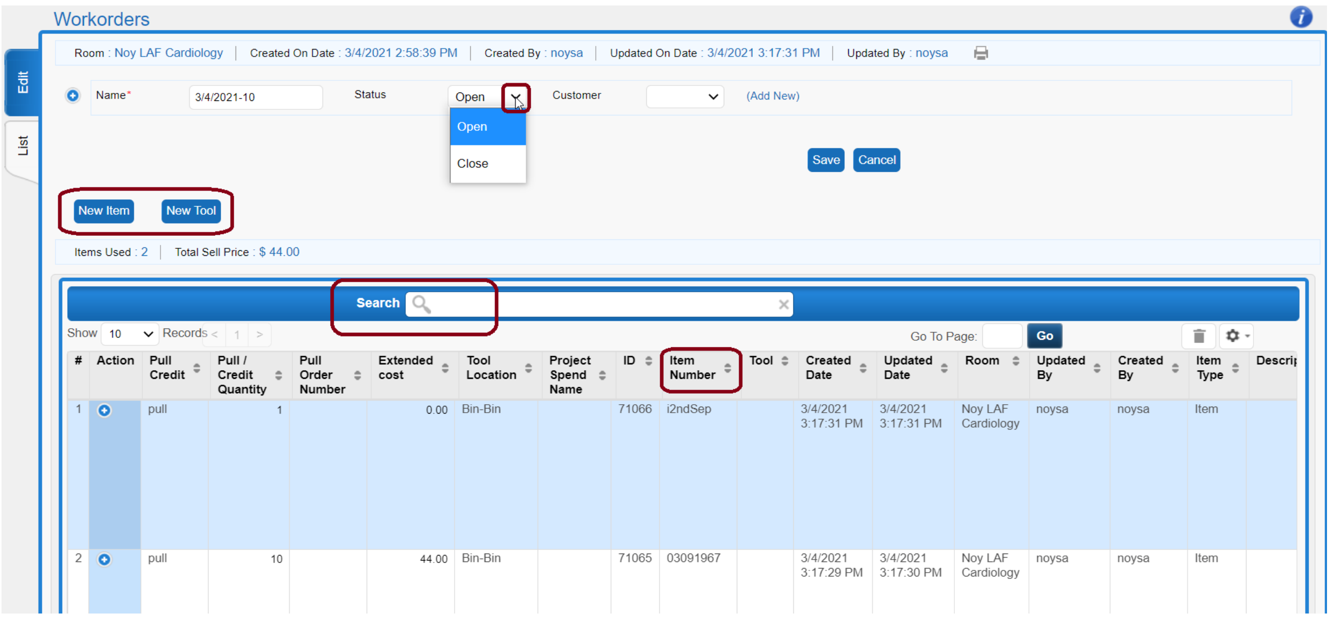
- Click the "+" icon to view the details of the Work Order.
- Click the "-" icon to close the detail view.



- To open an existing Work Order, click on the (Work Order) ***Name*** hyperlink.

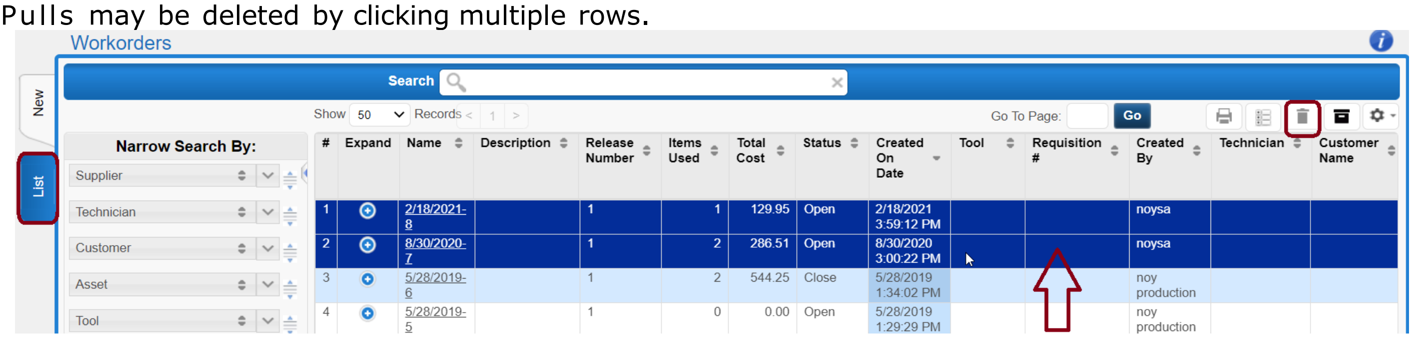


- The detailed view of the Work Order will be displayed.
  - Name of the Work Order
  - Status:
    - Open – Work Order can be edited.
    - Close – Work Order cannot be edited (can be unclosed to edit).
  - New Item – can be added to an Open Work Order.
  - New Tool – can be added to an Open Work Order.
  - Search – type keywords in the search field to find an item details of the Work Order.
  - Item(s) pulled are displayed.

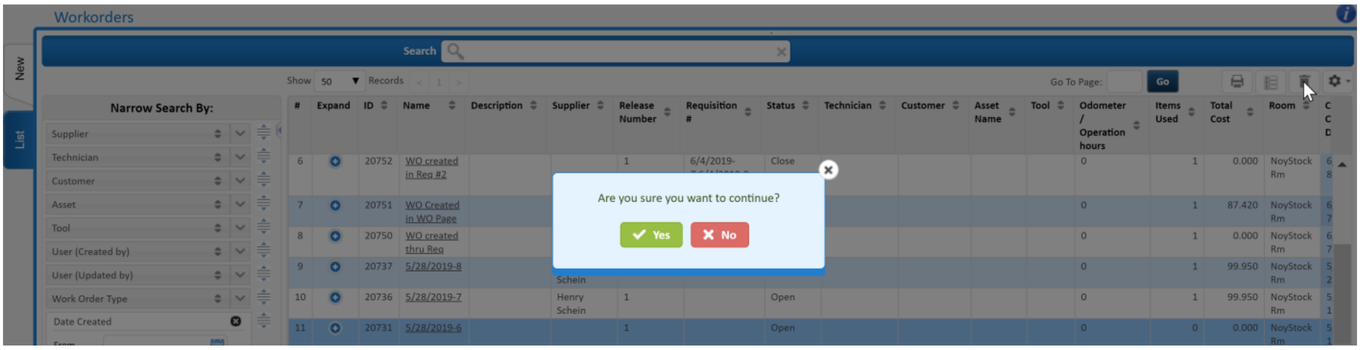


11. Delete or Undelete a Work Order

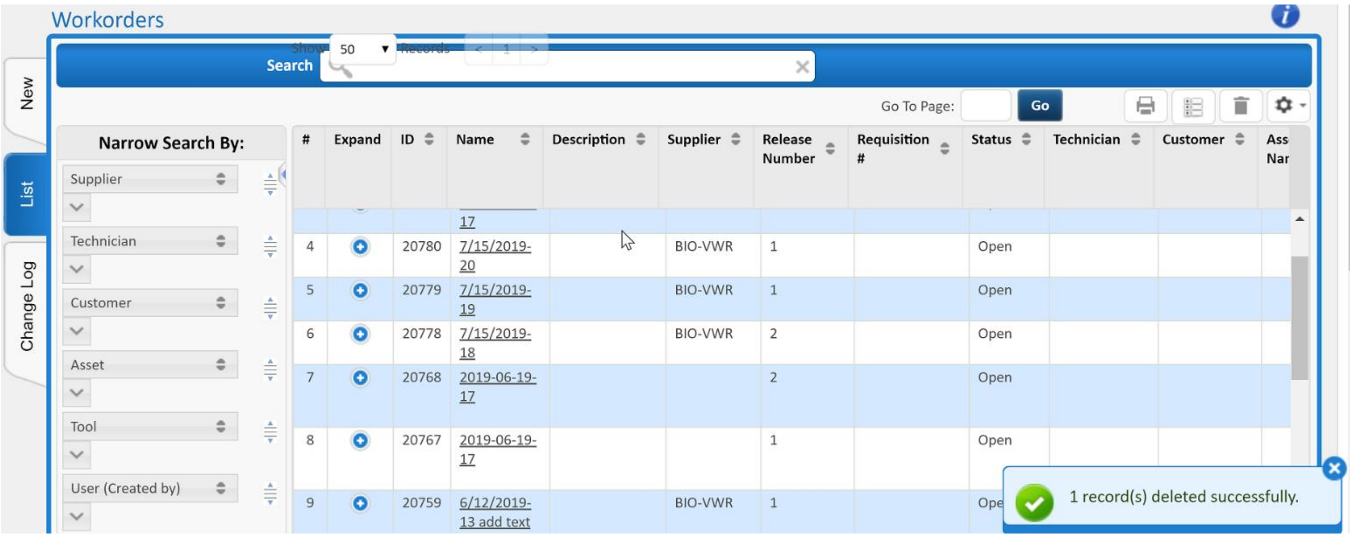
To delete a Work Order, click on the List tab. Click on the row(s) in the grid (highlighting it with dark blue color) and then click the Delete icon or press Delete key on your keyboard. Multiple Pulls may be deleted by clicking multiple rows.



- Click yes when prompted to continue.

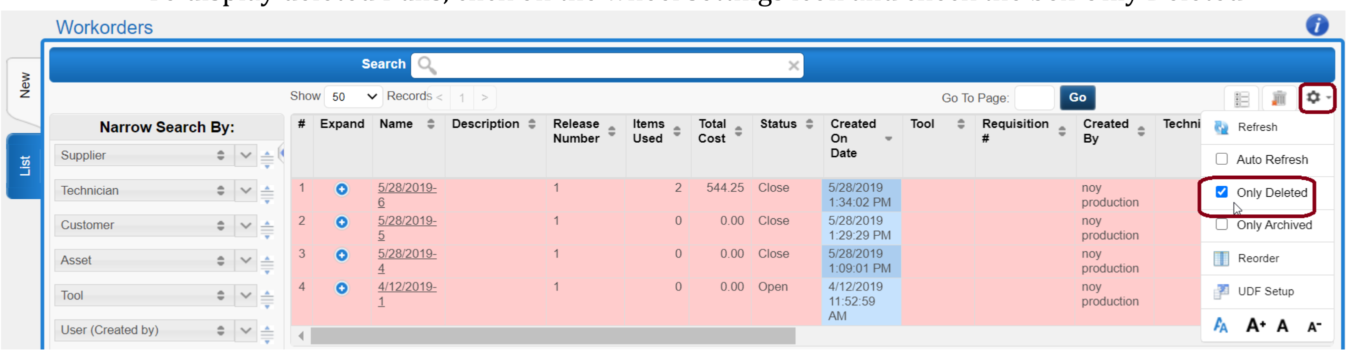


- A confirmation of the record(s) being deleted will be displayed at the bottom righthand corner of the screen.

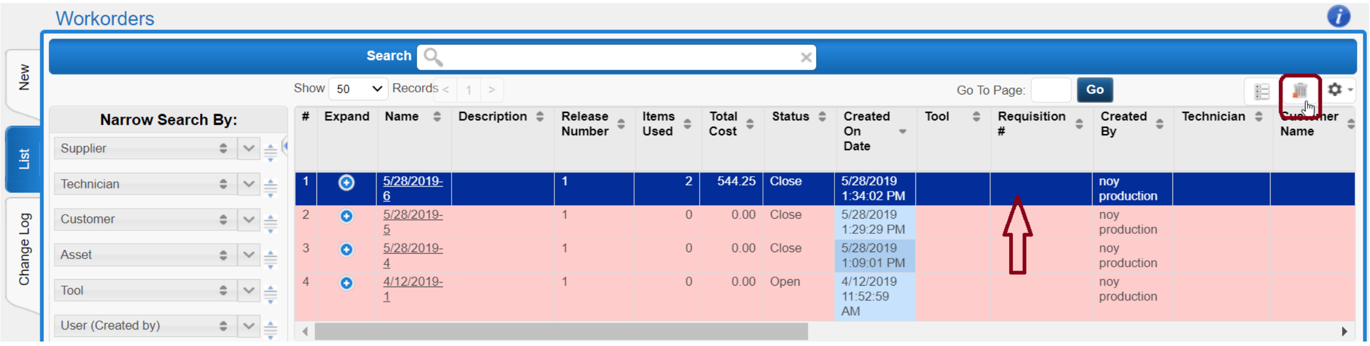


Note: Deleting Work Order(s) does <u>not</u> credit back the quantities pulled into the general inventory.

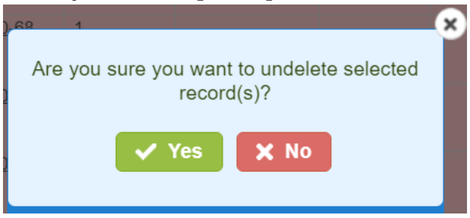
- To display deleted Pulls, click on the wheel settings icon and check the box Only Deleted.

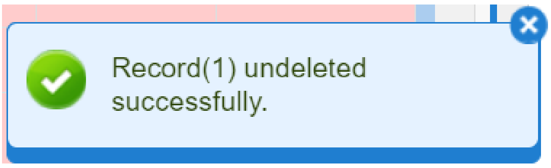


- To Undelete a Work Order click on the row (highlighting it in dark blue color) and click on the undelete trashcan icon.



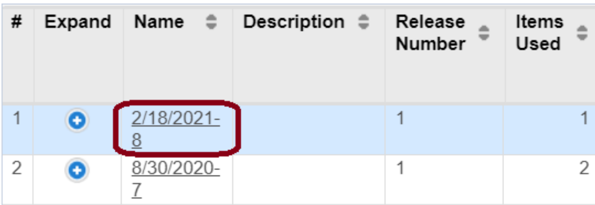
- Click yes when prompted.

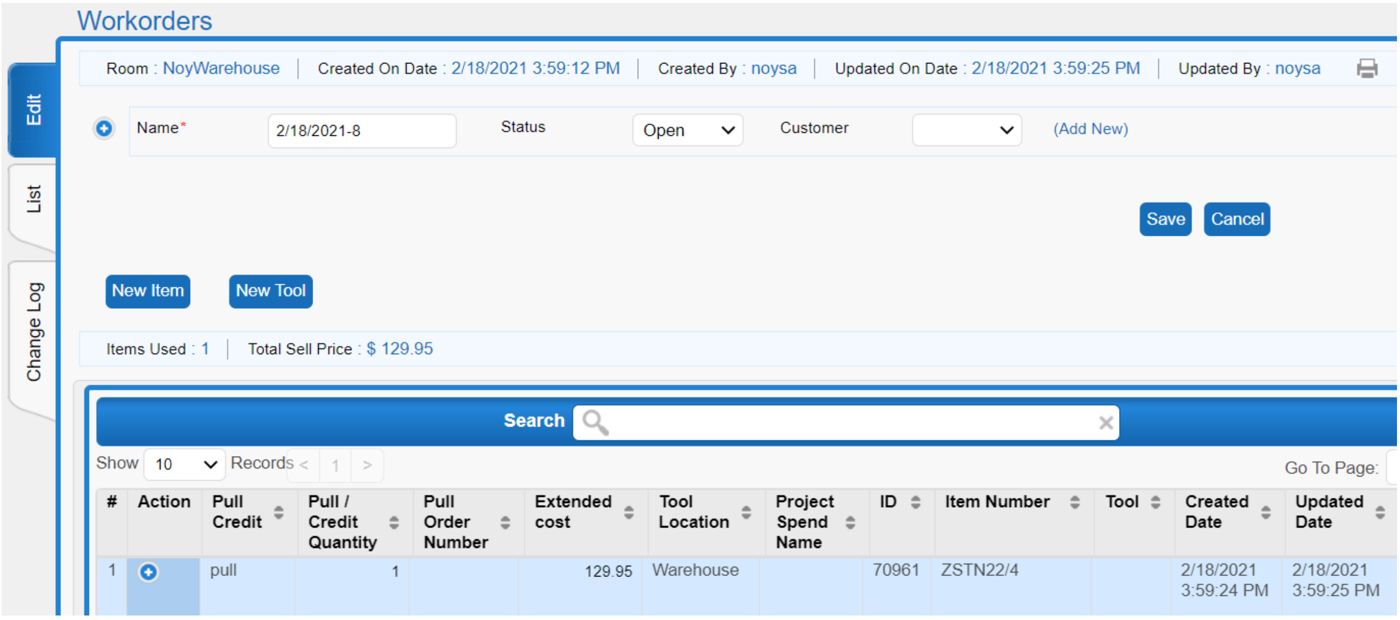




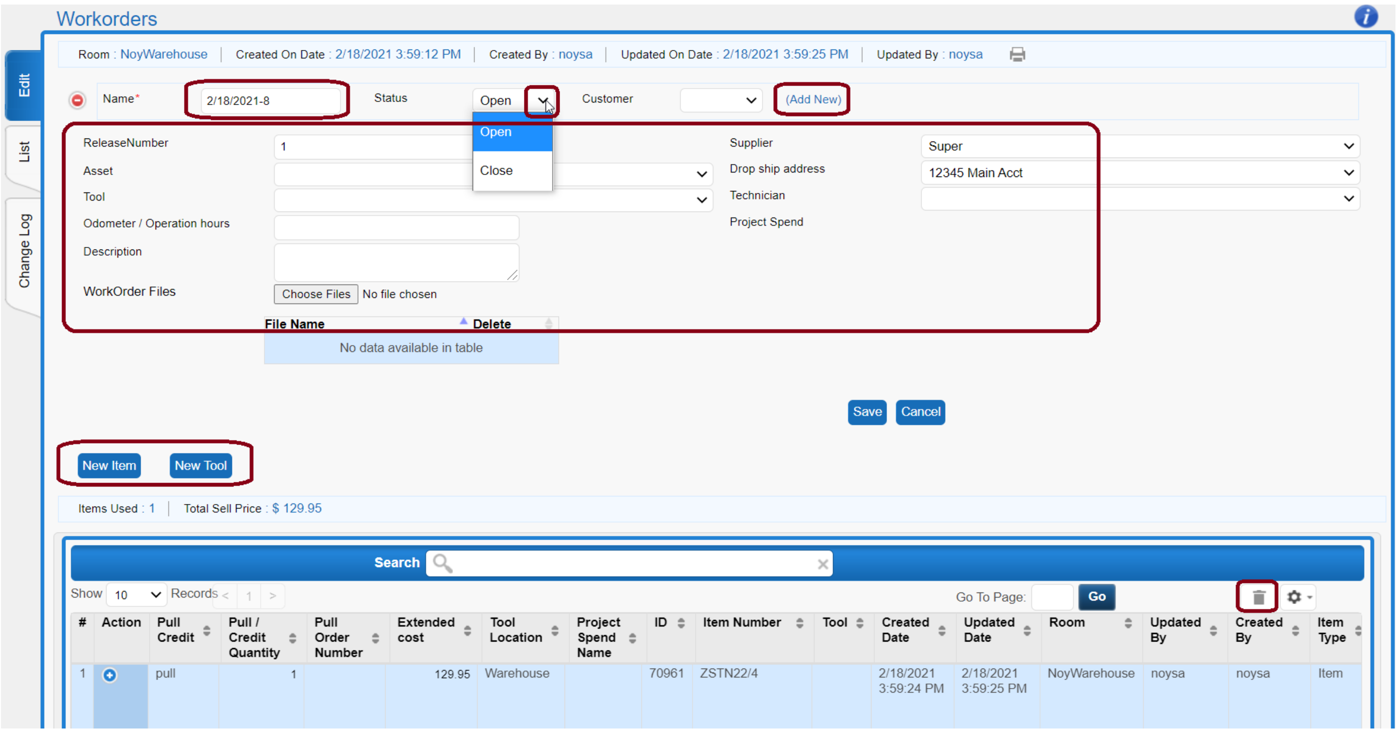
12. Edit/Update a Work Order

A Work Order with a status that is "open" can be edited or updated. In the List Tab, click on the Work Order Name hyperlink and the Work Order details page will be displayed.



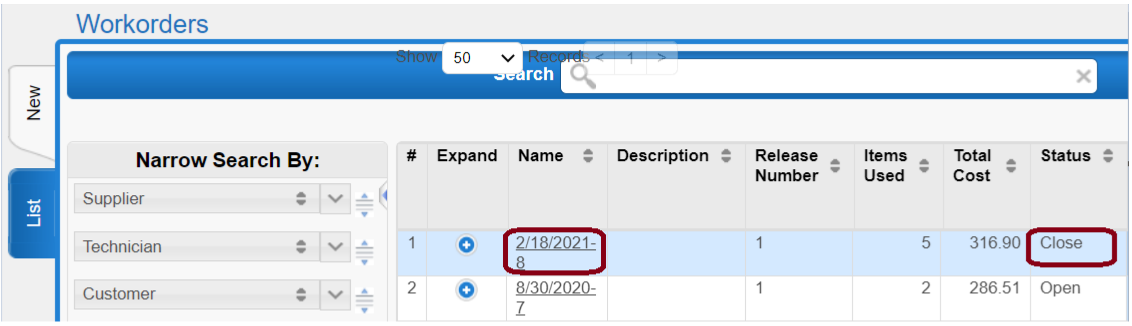


- The Work Order Name can be edited.
- The Status can be updated from Open to Close.
- Choose an existing Customer from the drop-down list or an option to Add New customer by clicking (Add New) hyperlink.
- Click on the New Item button to add new items to the existing Work Order.
- Click on the New Tool button to add new tools to the existing Work Order.
- To delete Item(s) click on the row(s) to select, highlighting the row, and click on the trashcan icon 
  - Item quantities from deleted Pulls, are put back into general inventory.
- Save.

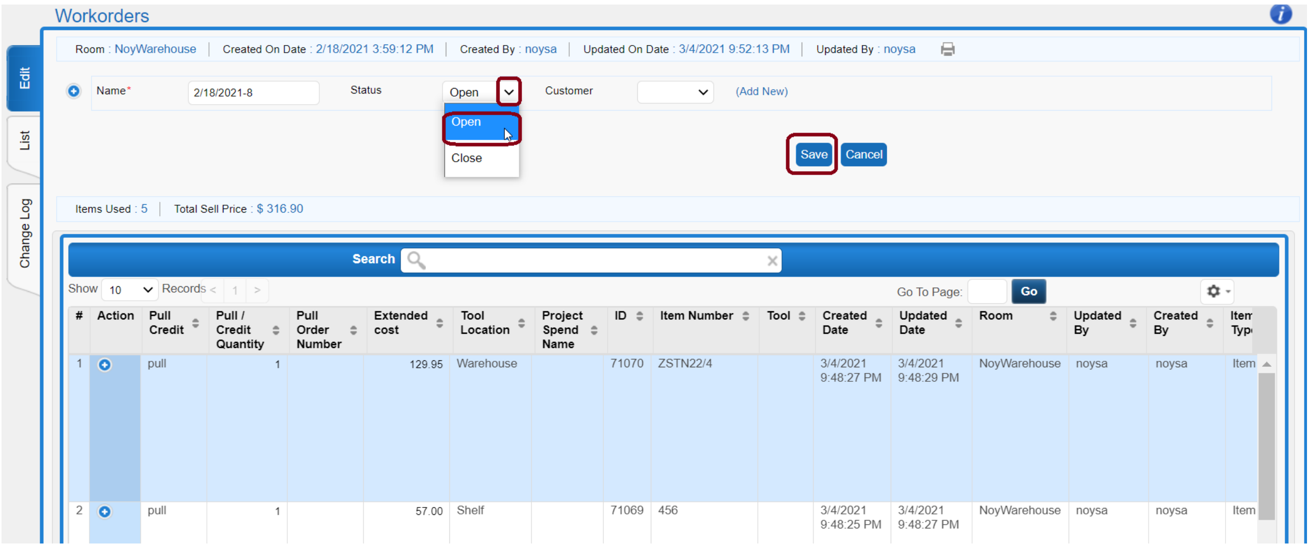


13. Unclose a Closed Work Order

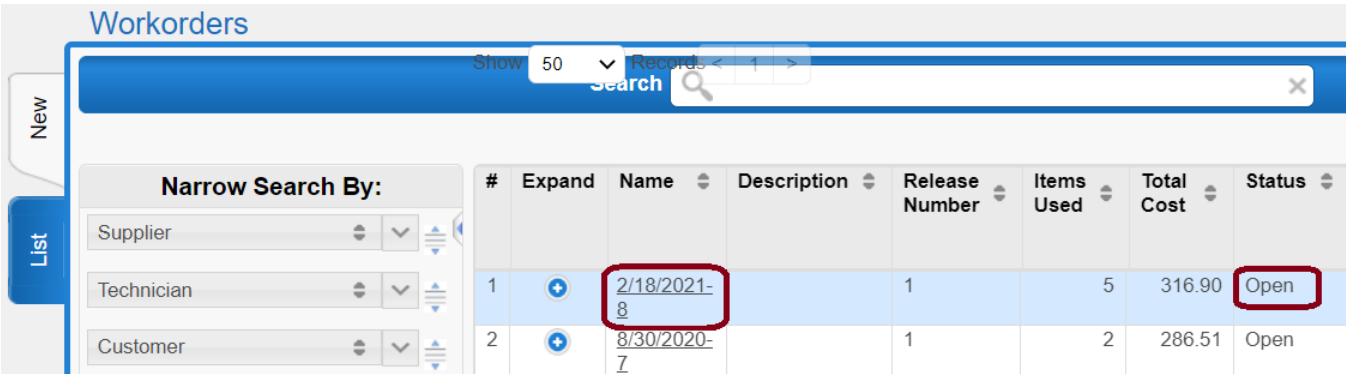
Click on the Work Order Name hyperlink of an existing closed Work Order.



- The Work Order details page will be displayed.
- Click on the Status drop-down arrow and choose “Open”.
- Click the Save button.



- The page will refresh and display the Work Orders list page, listing the Work Order’s status as Open (from Closed).



- Edit the Workorder if needed (following instructions on #12 Edit/Update a Work order)

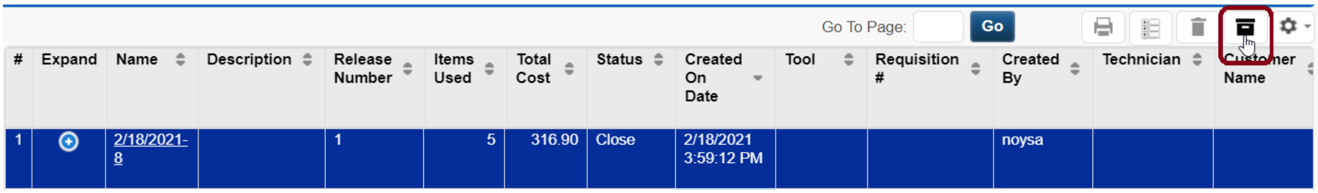
14. Archiving Work Orders

Use the archive function to archive older transactions to increase performance and response time. Archived transactions are still accessible when running reports. Only closed Work Orders can be archived.

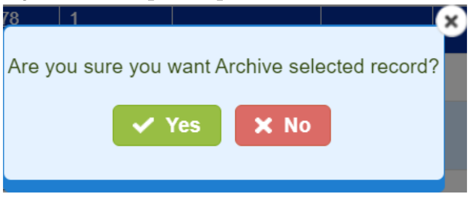
- Choose a record to archive by clicking on a row(s) (highlighting it in dark blue color).

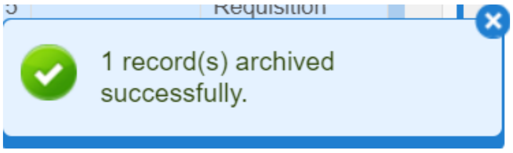
#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #	Created By
1		2/18/2021-8		1	5	316.90	Close	2/18/2021 3:59:12 PM			noysa

- Click on the archive icon.

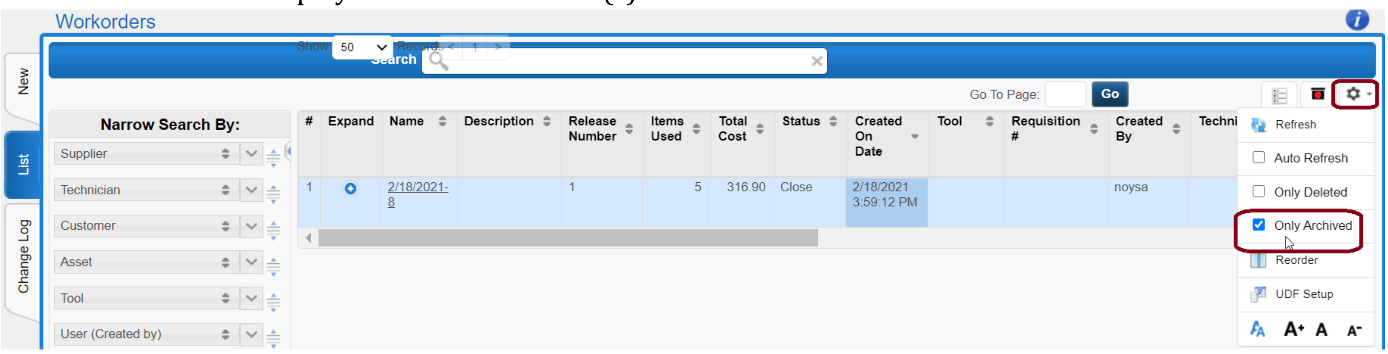


- Click yes when prompted.

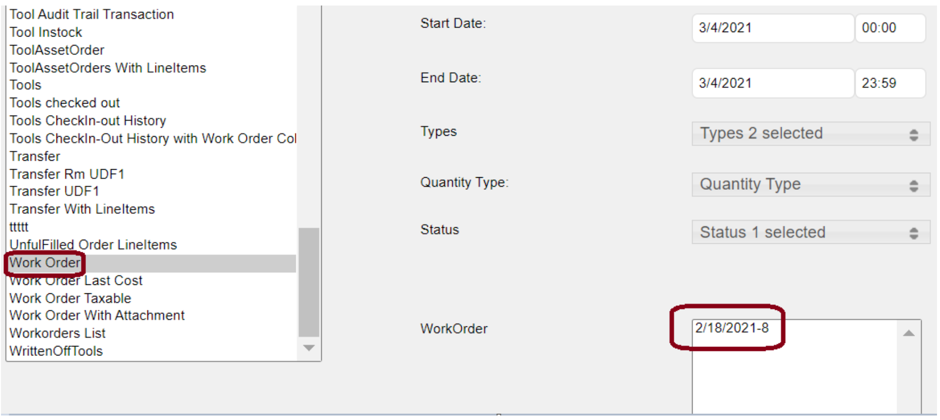




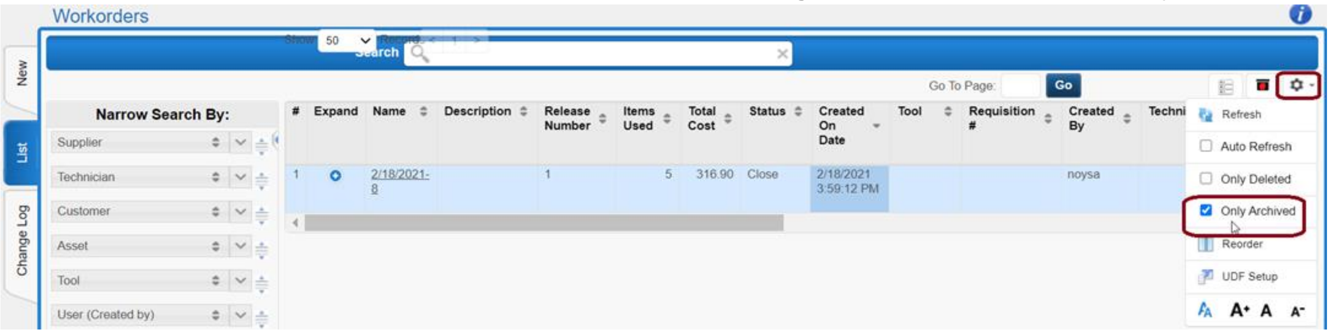
- Click on the wheel settings icon and check the box Only Archived.
- This will display the archived record(s).



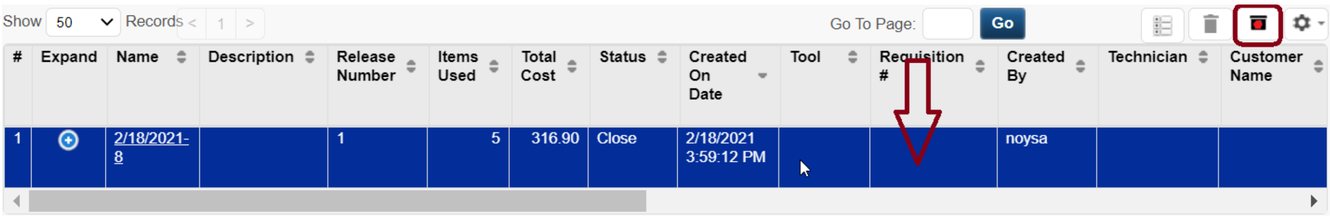
- The archived record(s) is still available when running the reports.



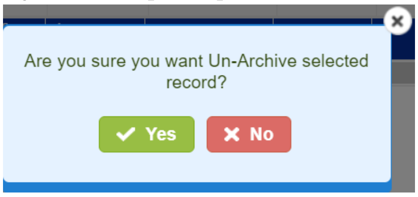
- To unarchive a transaction, click on the wheel settings icon and check the box Only Archived.

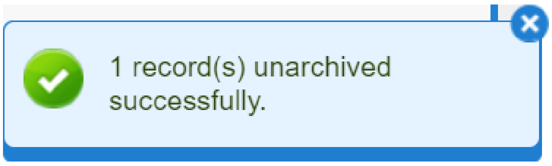


- Click on the row(s) to unarchive a transaction (highlighting it in dark blue) and click on the unarchive button.

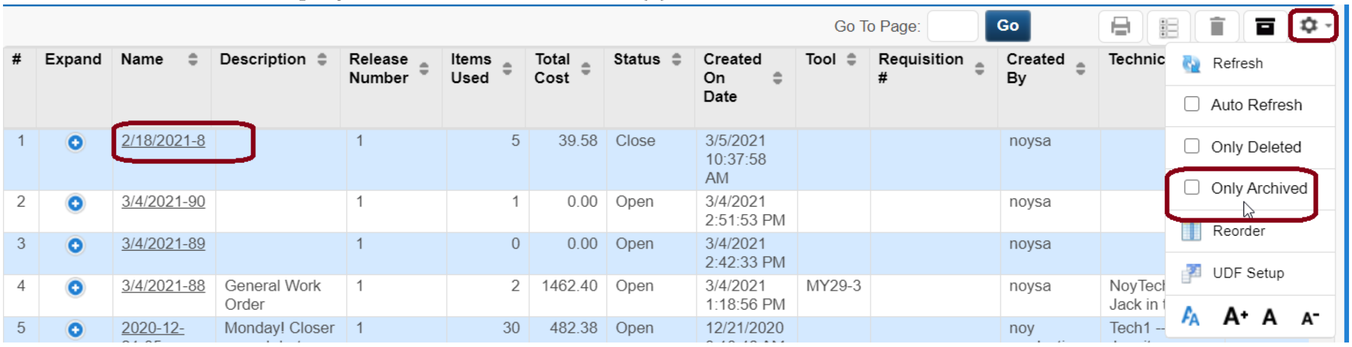


- Click yes when prompted.

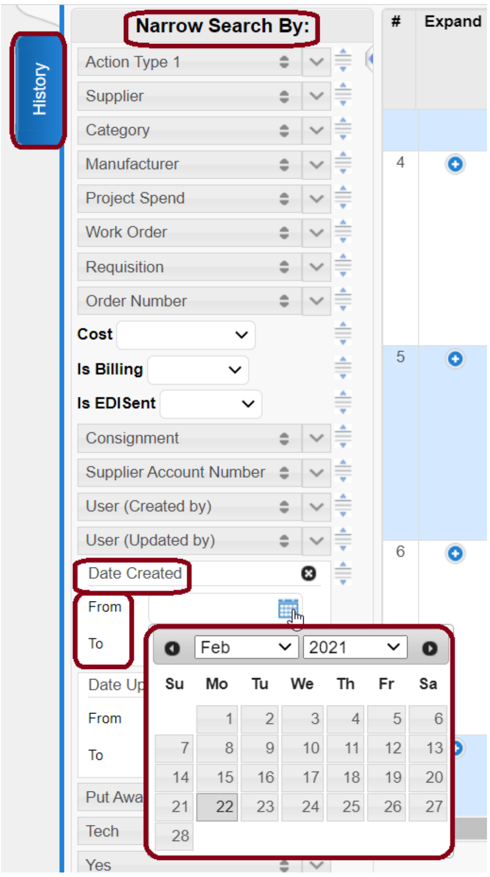




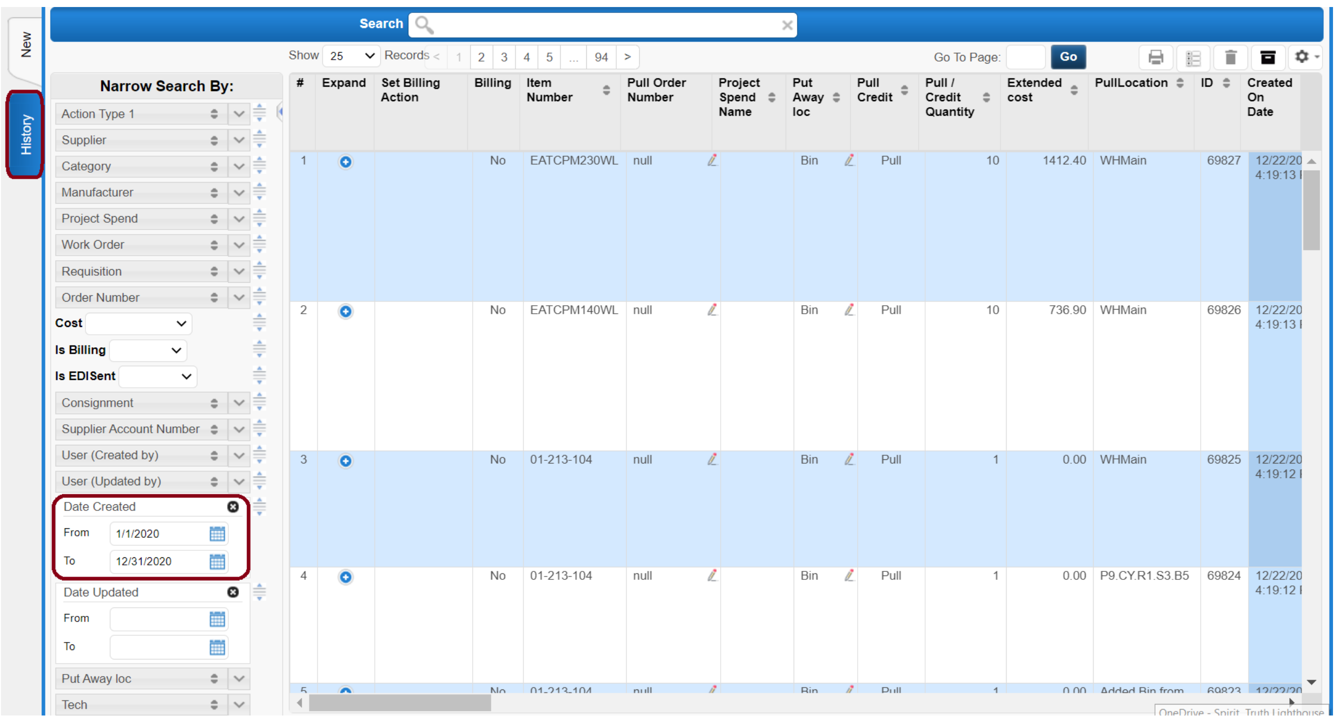
- Click on the wheel settings icon and uncheck the box Only Archived.
- This will display the unarchived record(s).



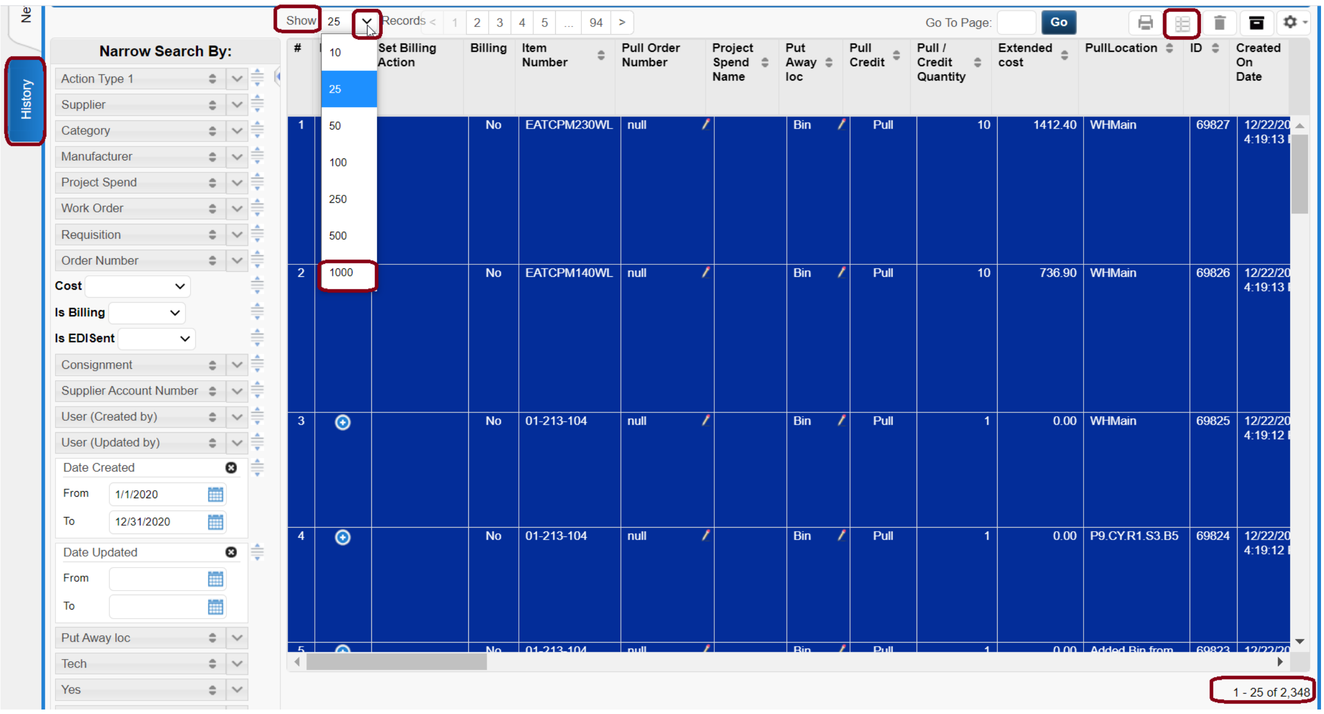
- To archive transactions using a date range, click on the History tab.
- Under the Narrow Search By, click on the Date Created From and To range.
- Choose a calendar year.



- This will display all historical transactions for the Date Created selected.

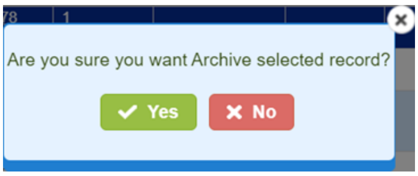


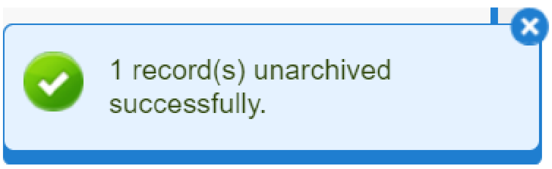
- Note the number of transactions for the date range selected. In the example it is 2,348.
- Click on the drop-down arrow under Show Records and choose the appropriate value to display all records.
- Click on the Select All icon (highlighting all records in dark blue color)



- Click on the archive icon.

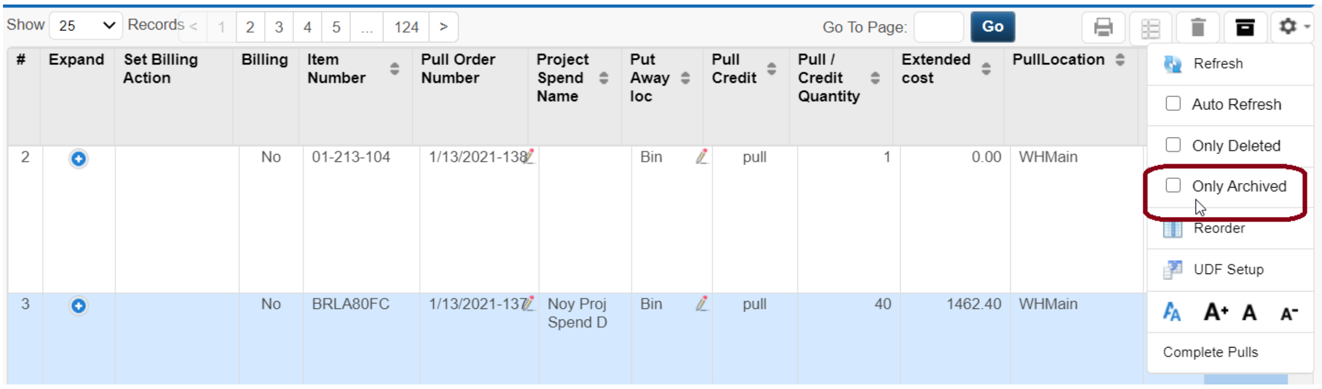
- Click yes when prompted.





Note: Repeat until all records to archived are selected for the Date Range.

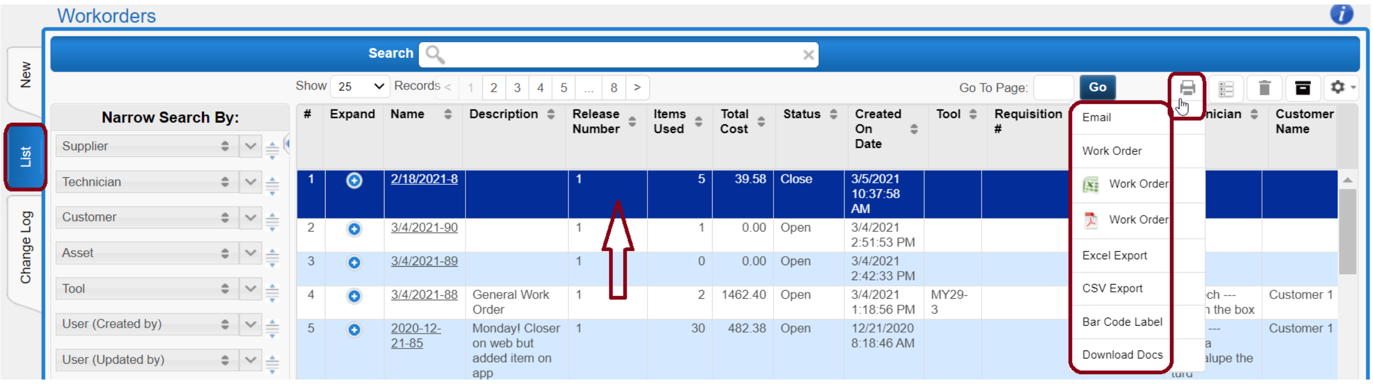
- Click on the wheel settings icon and uncheck the box Only Archived.
- This will display the unarchived record(s).



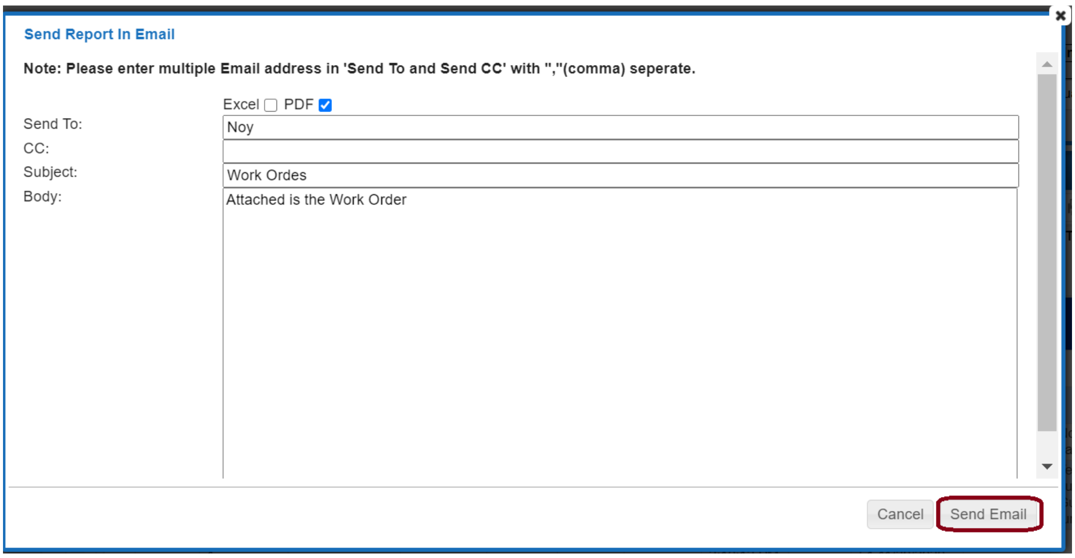
Note: You cannot archive a Work Order transaction that is linked to an unclosed Requisition.

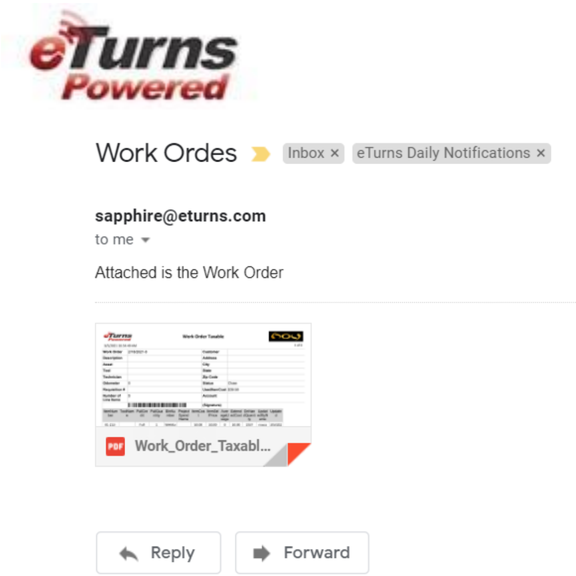
15. Print or Export Work Orders

In the List tab, print or export the Work Order(s) by clicking the row(s), highlighting it (displayed in dark blue color) and point the mouse over the printer icon . Print or export through the following options:

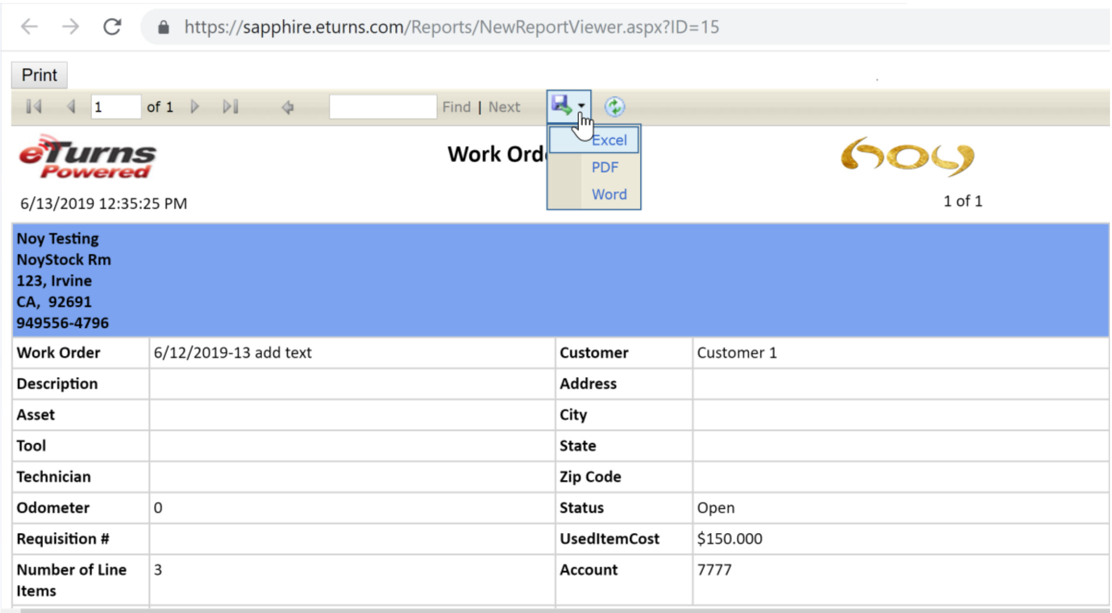


a) **Email**: Click on the Email. The email page will be displayed. Choose to send the attachment as an excel and/or pdf and send the email.

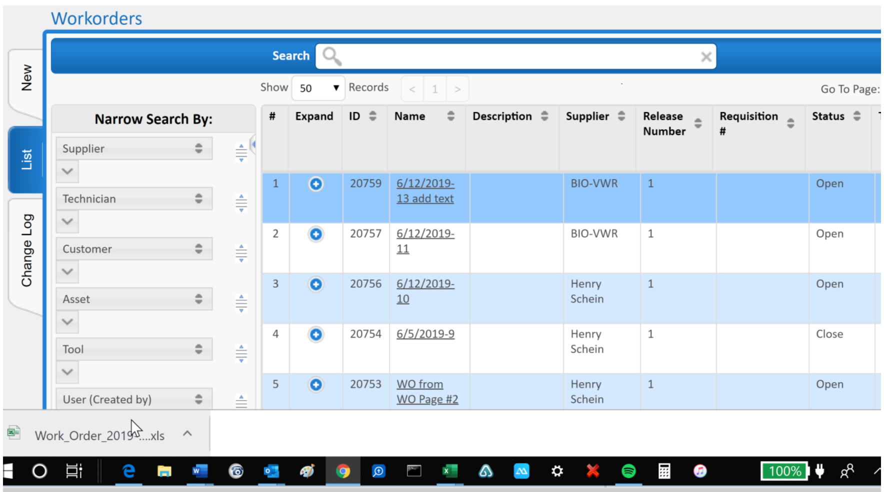




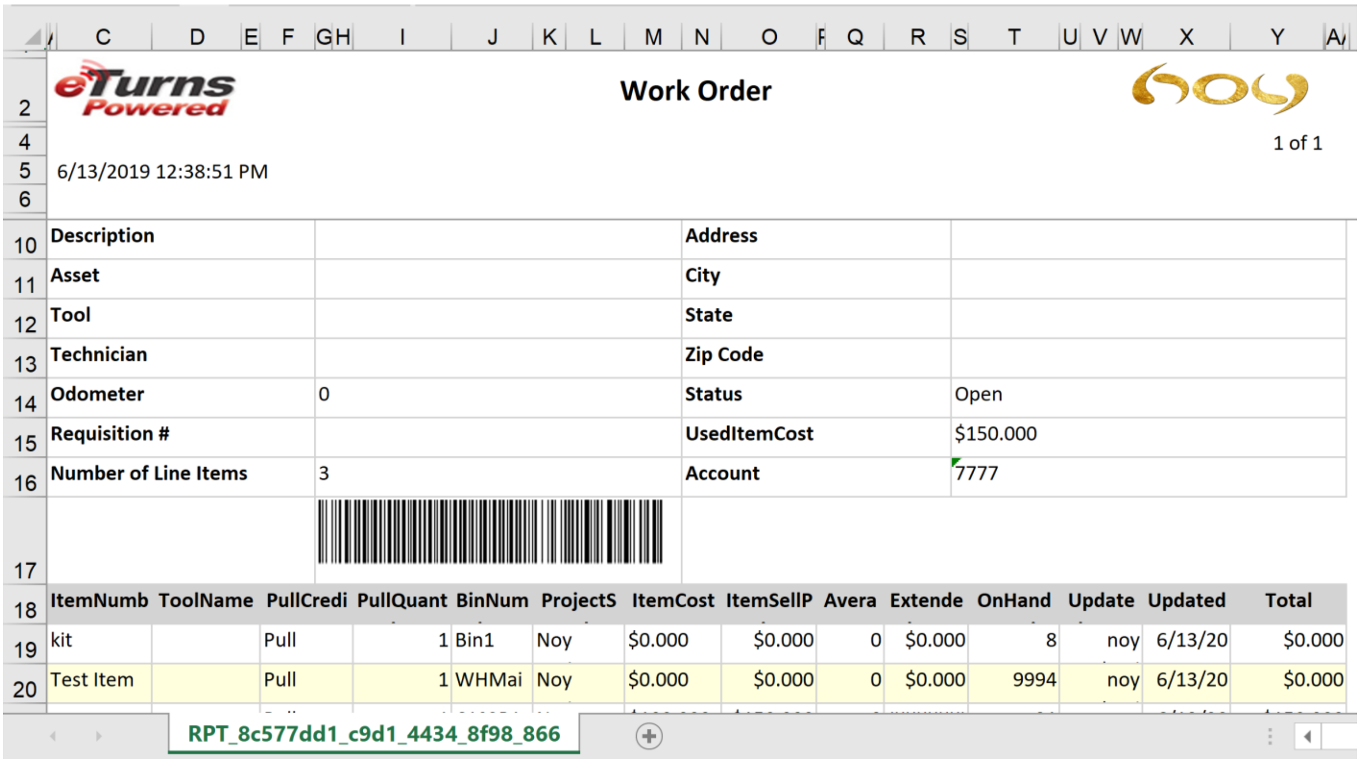
b) **Work Order**: Click on Work Order. It will display the Work Order(s) in an xml webpage that can be saved or exported to Excel, PDF or a Word document.



c) **Excel**: Converts the Work Order to an excel spreadsheet. Click on the downloaded excel spreadsheet to open the file.



- The Work Order will open as an excel spreadsheet.



Work Order

1 of 1

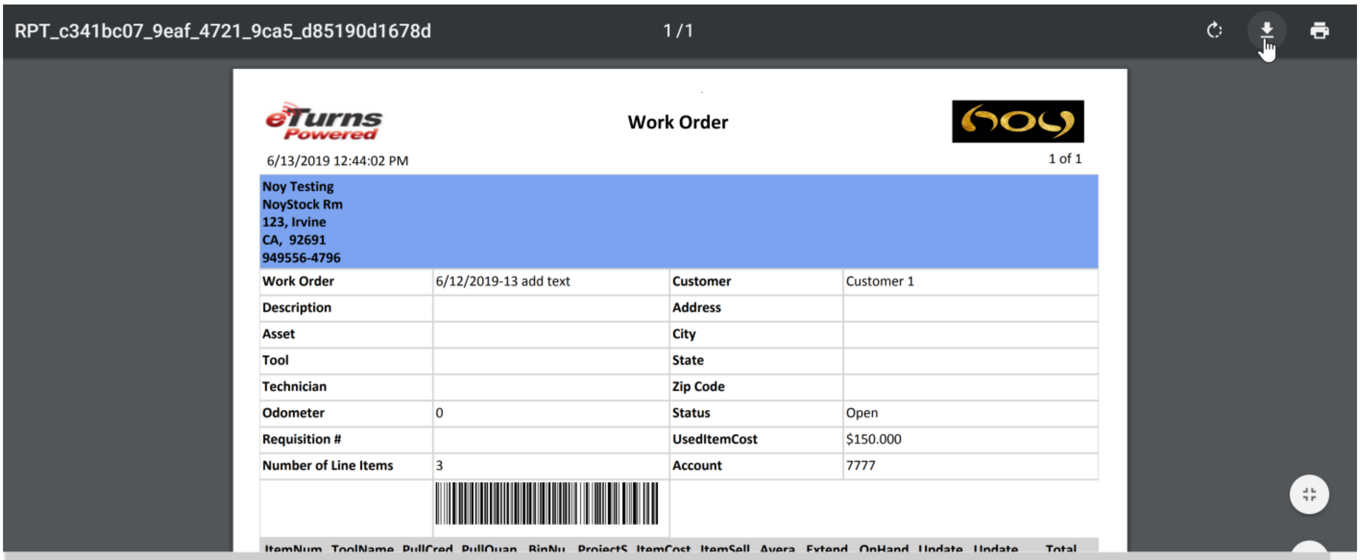
6/13/2019 12:38:51 PM

Description		Address	
Asset		City	
Tool		State	
Technician		Zip Code	
Odometer	0	Status	Open
Requisition #		UsedItemCost	$150.000
Number of Line Items	3	Account	7777

ItemNumb	ToolName	PullCredi	PullQuant	BinNum	ProjectS	ItemCost	ItemSellP	Avera	Extende	OnHand	Update	Updated	Total
kit		Pull	1	Bin1	Noy	$0.000	$0.000	0	$0.000	8	noy	6/13/20	$0.000
Test Item		Pull	1	WHMai	Noy	$0.000	$0.000	0	$0.000	9994	noy	6/13/20	$0.000

RPT_8c577dd1_c9d1_4434_8f98_866

d) **PDF**: Converts the Work Order to a PDF format. Click on the download icon



RPT_c341bc07_9eaf_4721_9ca5_d85190d1678d 1 / 1

Work Order

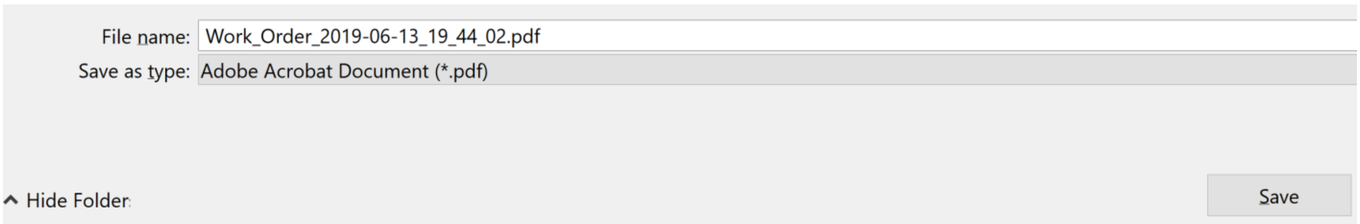
6/13/2019 12:44:02 PM

1 of 1

Noy Testing
NoyStock Rm
123, Irvine
CA, 92691
949556-4796

Work Order	6/12/2019-13 add text	Customer	Customer 1
Description		Address	
Asset		City	
Tool		State	
Technician		Zip Code	
Odometer	0	Status	Open
Requisition #		UsedItemCost	$150.000
Number of Line Items	3	Account	7777

- Save the downloaded file as a PDF.



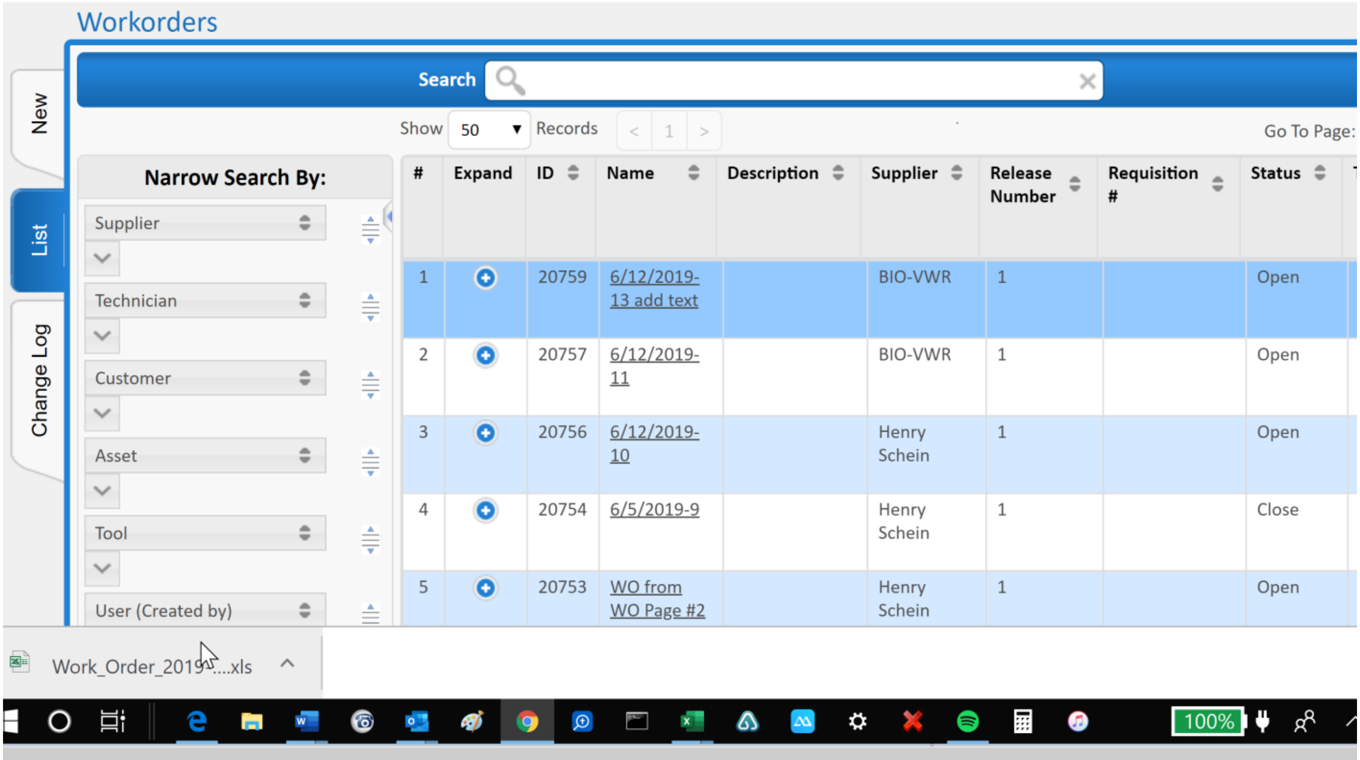
File name: Work_Order_2019-06-13_19_44_02.pdf

Save as type: Adobe Acrobat Document (*.pdf)

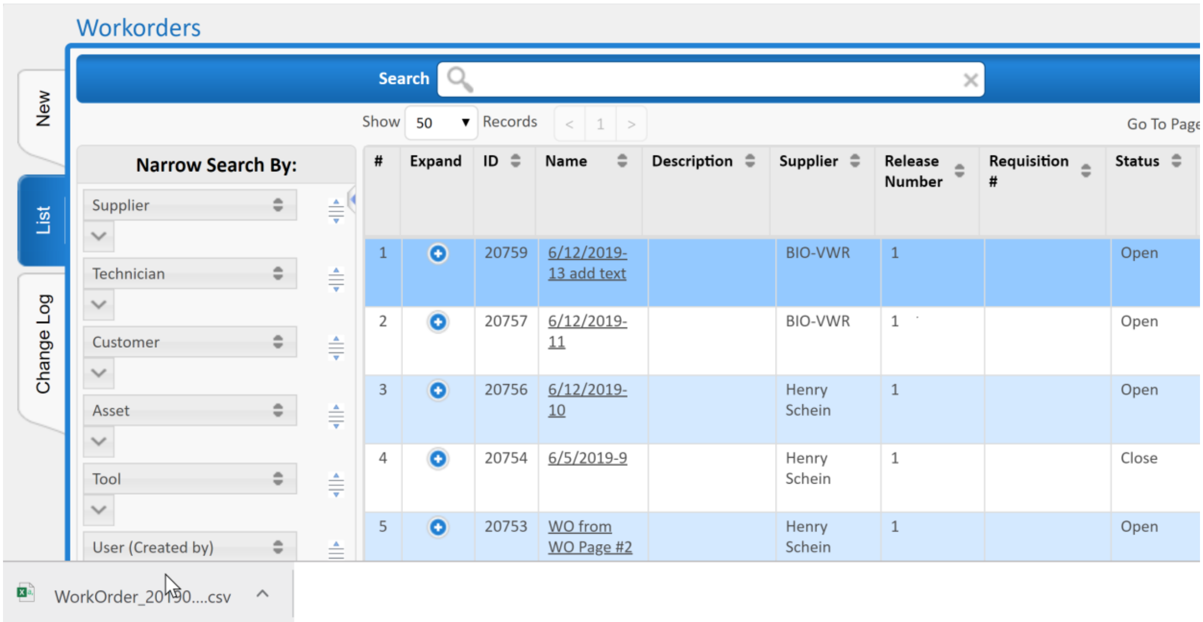
Hide Folder

Save

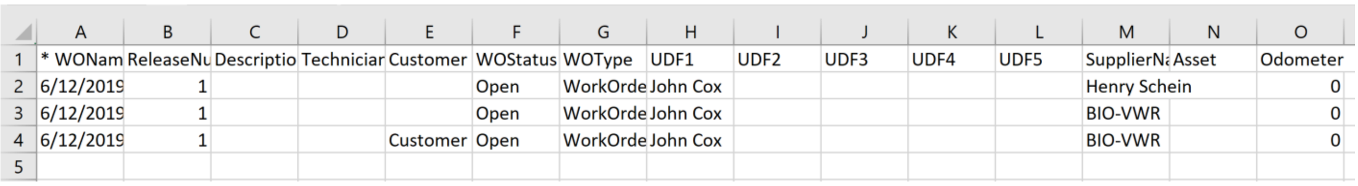
e) **Excel Export**: Converts the Work Order to an excel spreadsheet. Click on the downloaded excel file.



f) **CSV Export**: Converts the Work Order to CSV file format. Click on the downloaded csv file.

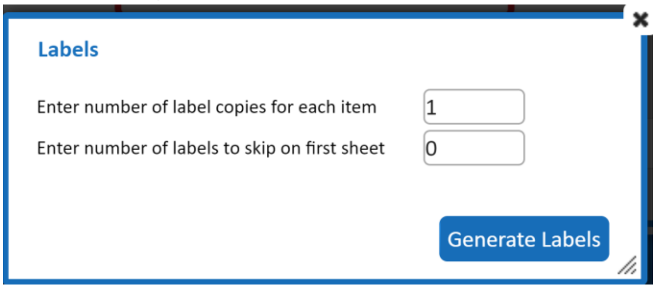


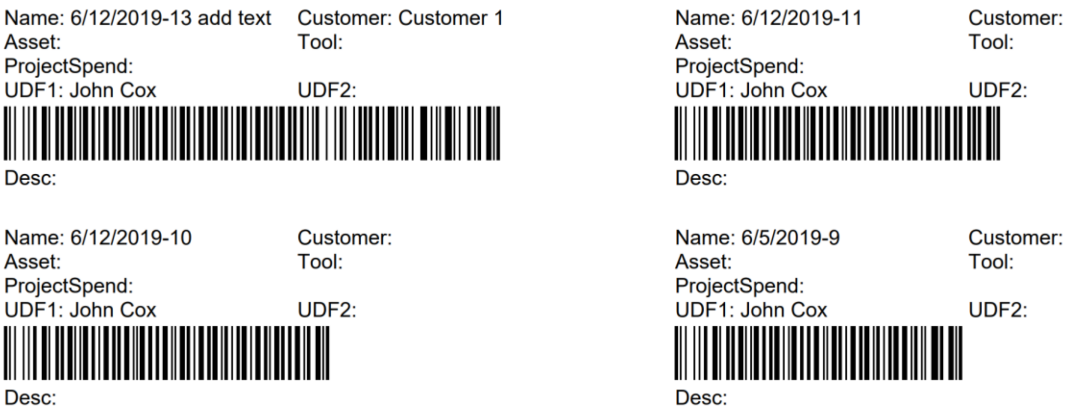
- Opens the downloaded csv file.



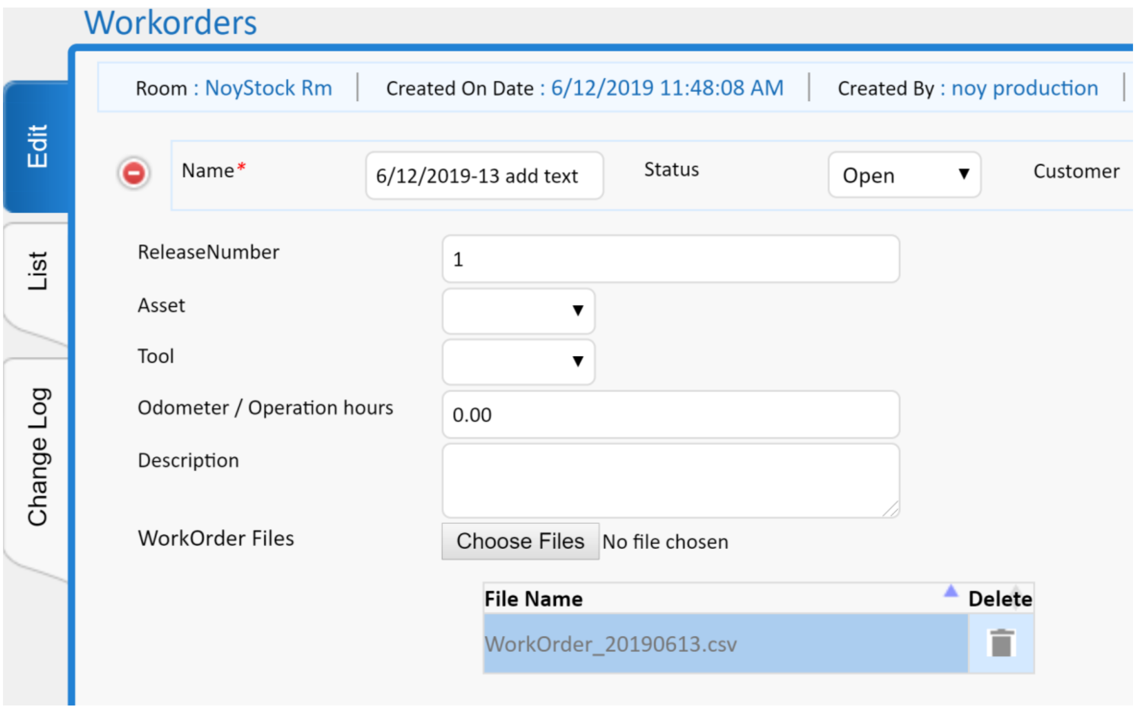
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	* WONam	ReleaseNu	Descriptio	Techniciar	Customer	WOStatus	WOType	UDF1	UDF2	UDF3	UDF4	UDF5	SupplierNa	Asset	Odometer
2	6/12/2019	1				Open	WorkOrde	John Cox					Henry Schein		0
3	6/12/2019	1				Open	WorkOrde	John Cox					BIO-VWR		0
4	6/12/2019	1			Customer	Open	WorkOrde	John Cox					BIO-VWR		0
5															

g) **Barcode Label**: Prints a page of barcode labels for each Work Order. Click on Generate Labels.

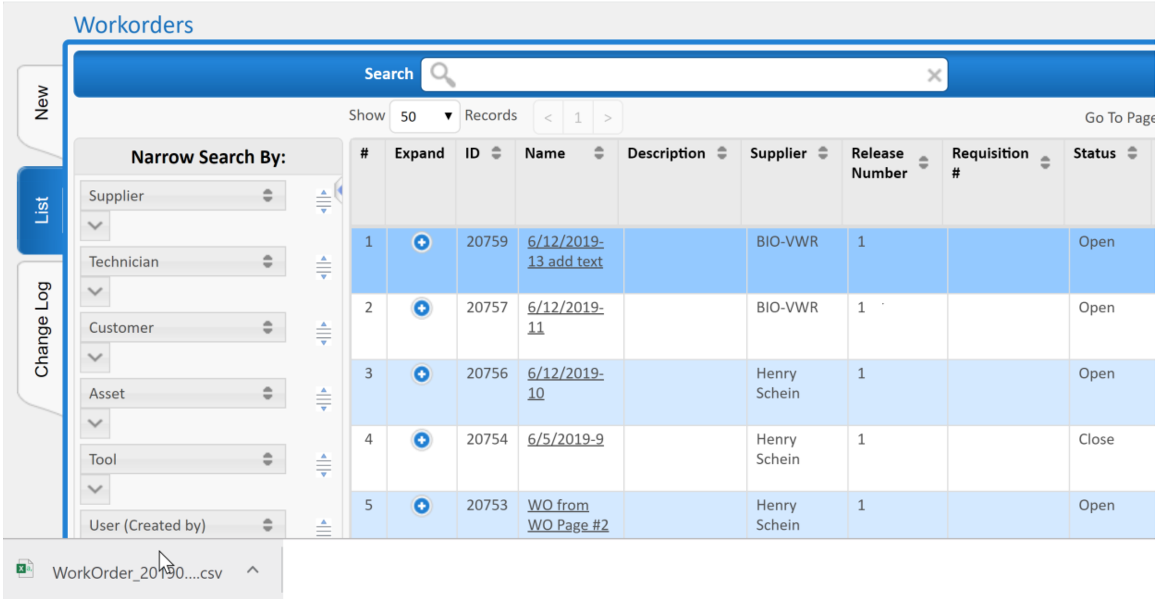




h) **Download Docs**: Download Work Order files if you wish to display or save them.

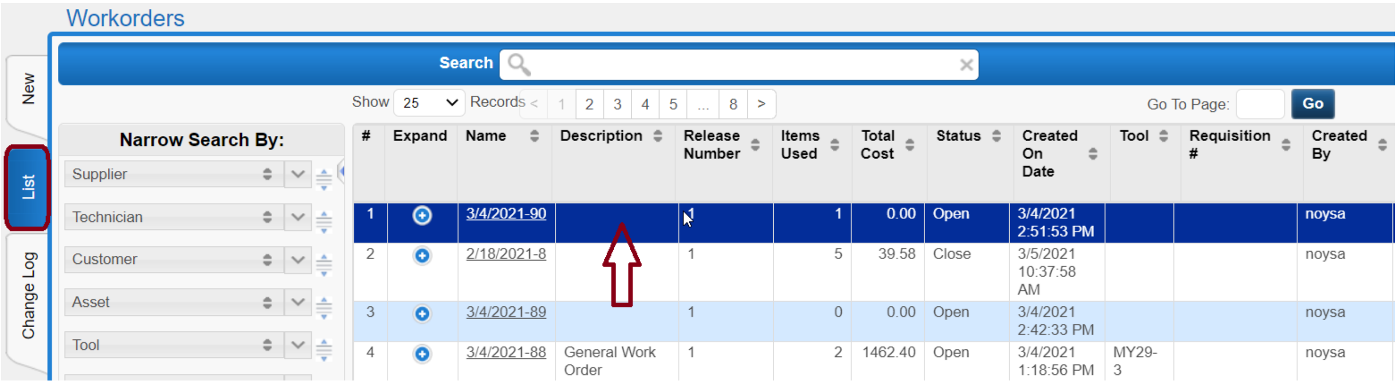


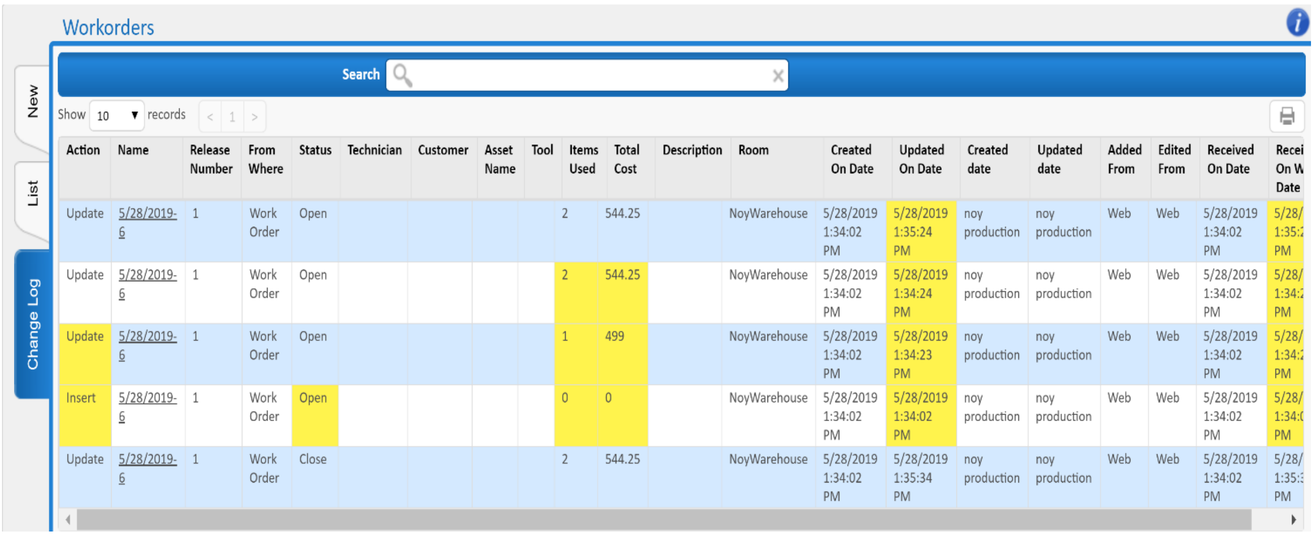
- Click on the downloaded file to open.



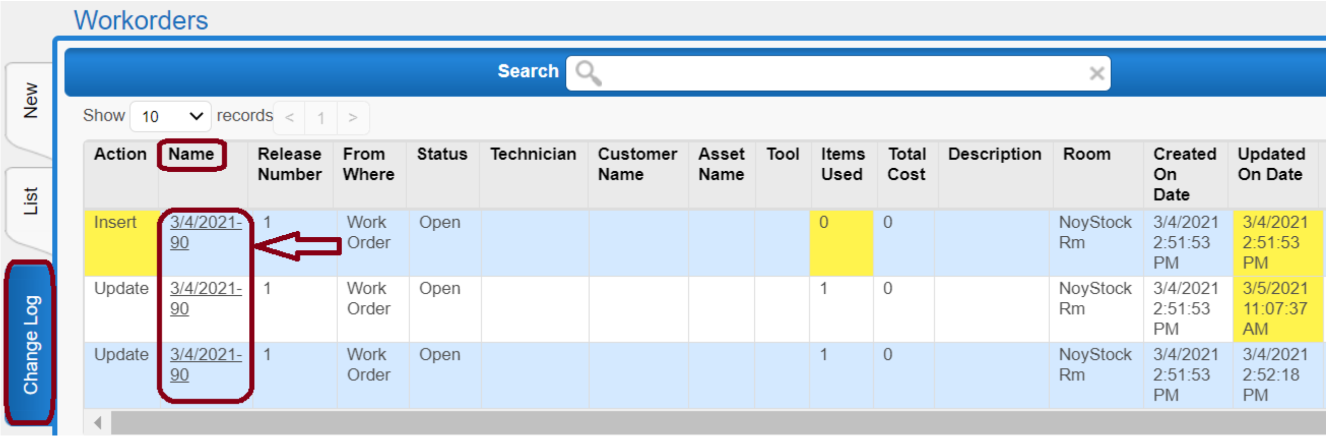
16. View change log:

The change log is a historical audit trail of the updates and/or changes to an individual Work Order. To view the change log, click on a row of a Work Order (highlighting it), while on the List tab, then click on Change Log tab. The changes will be displayed in yellow.

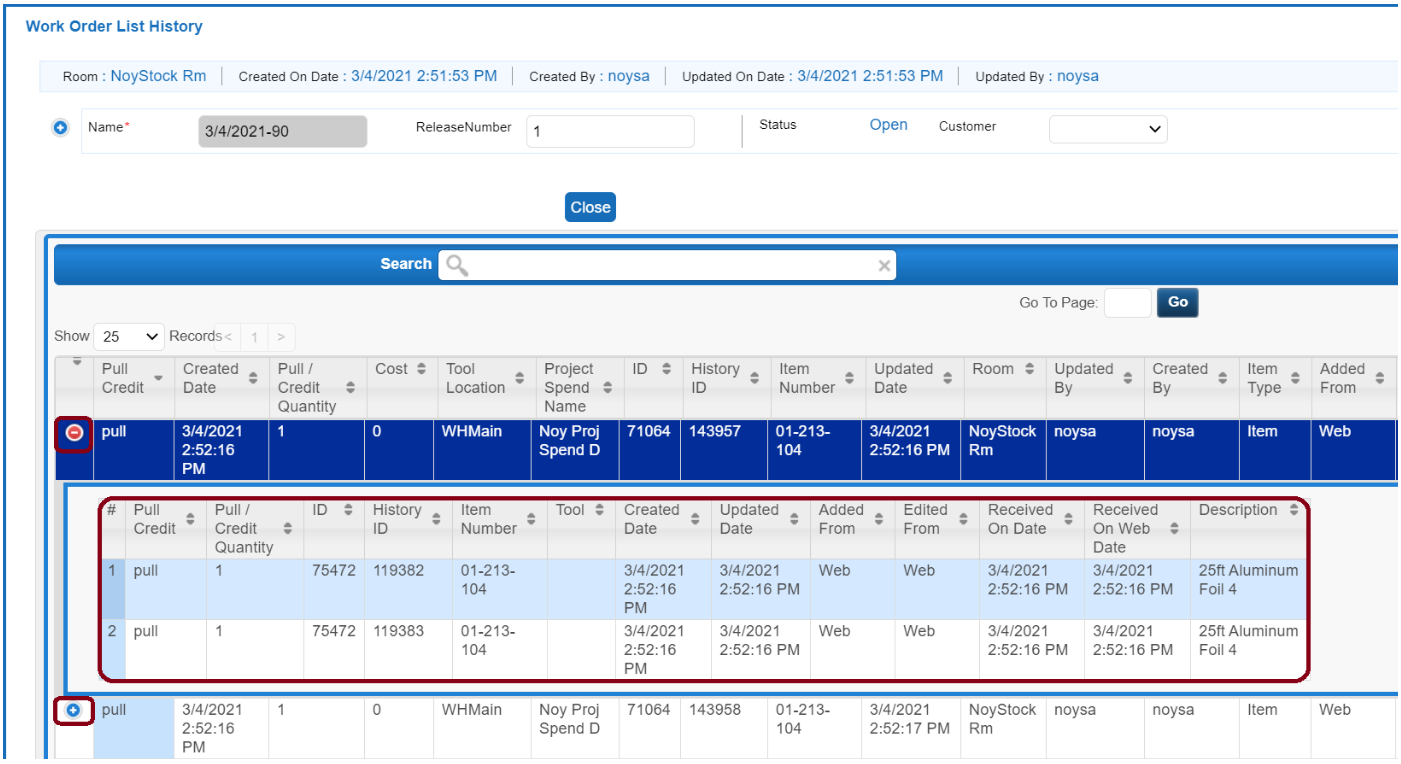




- To view the details of the Change Log, click on the Work Order Name hyperlink.



- The Work Order List History page will be displayed.
  - Click the "+" icon to view the item details of the Work Order.
  - Click the "-" icon to close item details view.



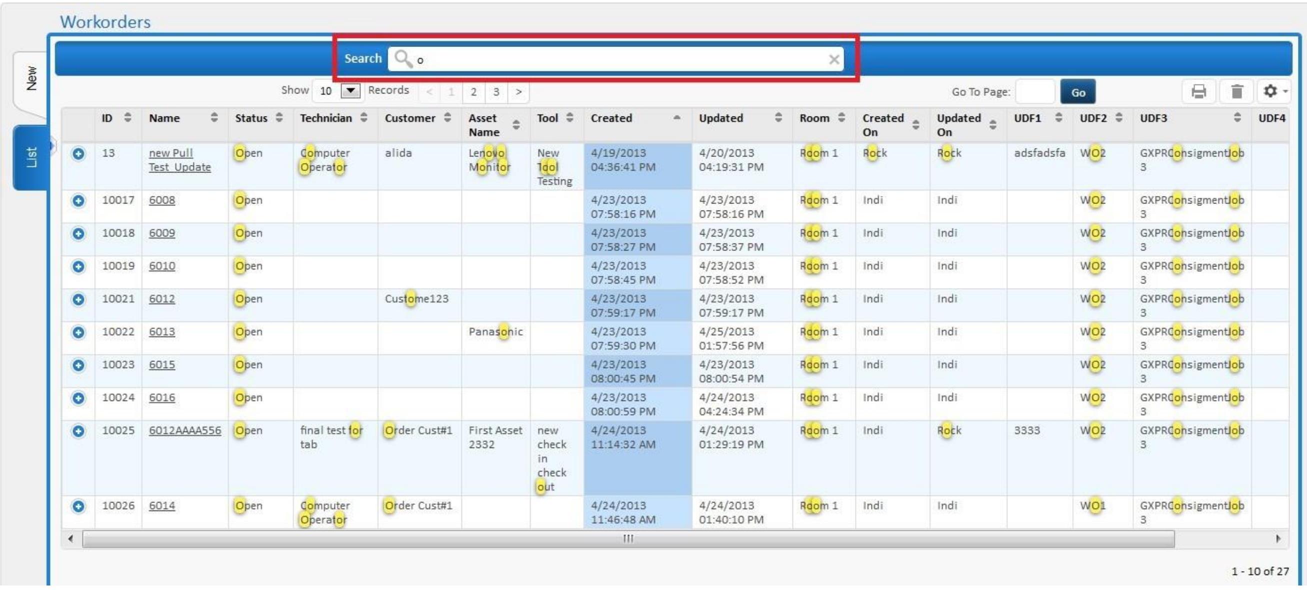
Note: The Change log is displayed in View only mode.

17. Search Work Order page

There are two options when searching the Pull page for pull transactions. The Main search and Narrow search options.

a) Main Search

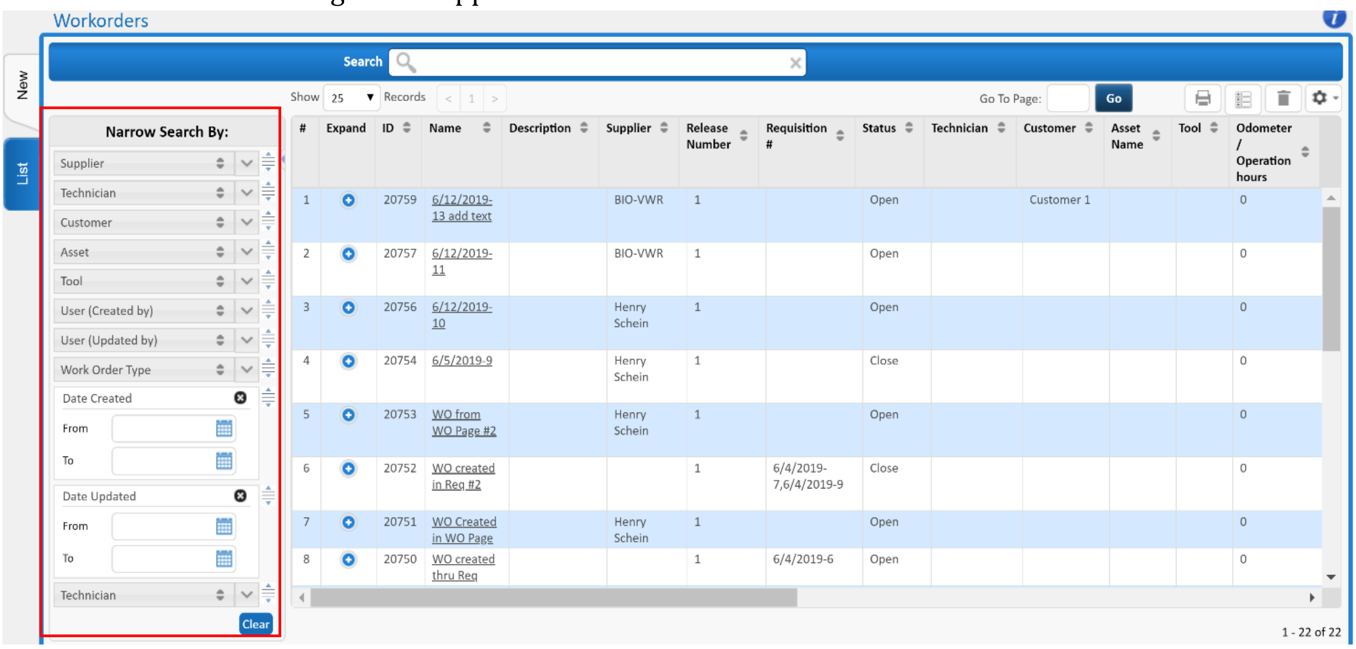
Type the keyword(s) in the search field. The keyword(s) search results are highlighted in yellow. The search results are filtered after the third character is typed.



b) Narrow Search

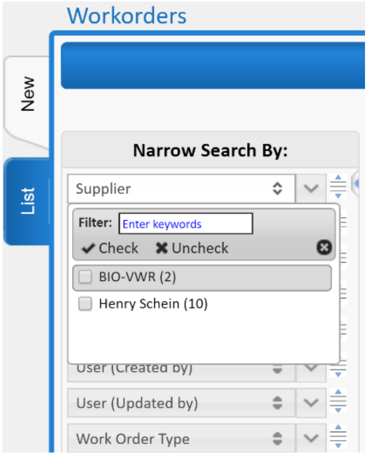
This function is used to filter or narrow down the scope of the search for user convenience. It is an alternate or can be used in conjunction with the (Main) Search function.

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

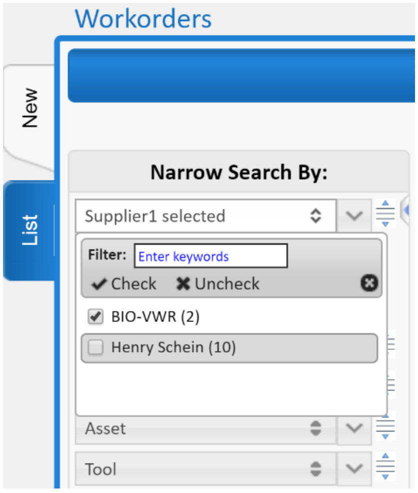


- You can search by:
  - Supplier
  - Technician
  - Customer
  - Asset
  - Tool
  - User Created or Updated By
  - Work Order Type
  - Date Created or Updated

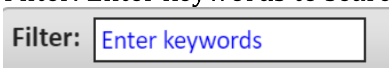
- Click on the double-arrow  and check the box to narrow the search. The number in parenthesis indicate the number of items found with the narrow search criteria.

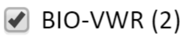


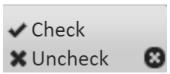
Note: Fields within the narrow search may vary from module to module.



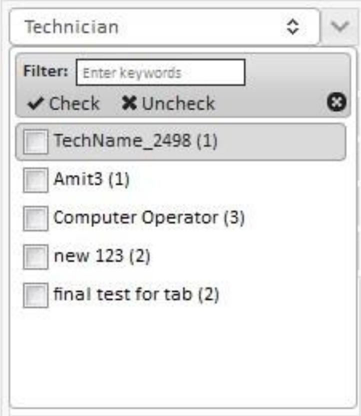
- Number in () is the # of items for that search result.
- Filter: Enter keywords to search within the selected category

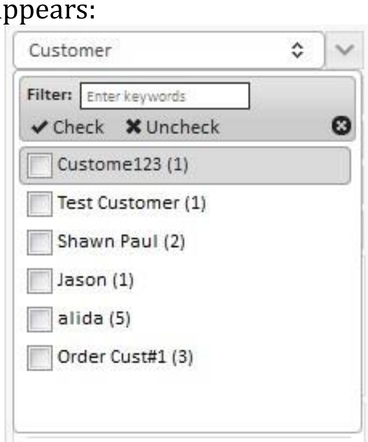


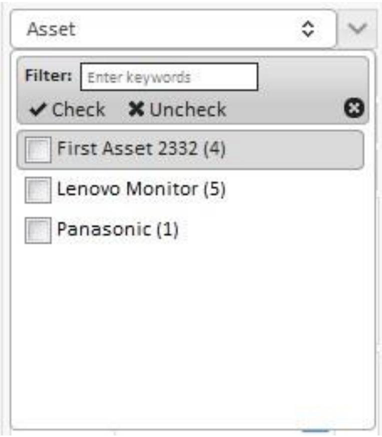
- Check the box to filter a search result. 

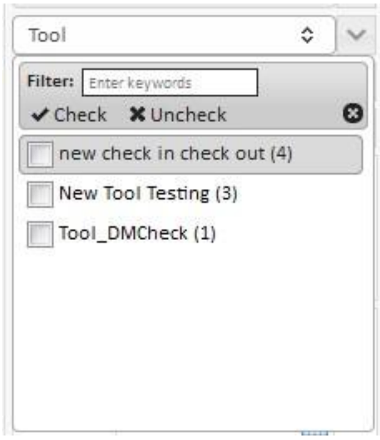
- Click 

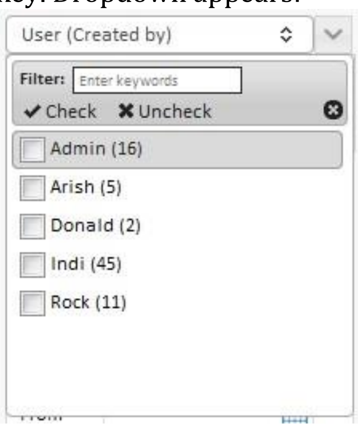
Check to select all
- Click *X Uncheck* to remove all selections
- Click  to close the Narrow Search filter
- This applies to all Narrow Search functions

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Supplier/Technician/ Customer/Asset/ Tool</td><td>It is used to filter the module in accordance to the Technician field. Click on up- down arrow key. Dropdown appears:


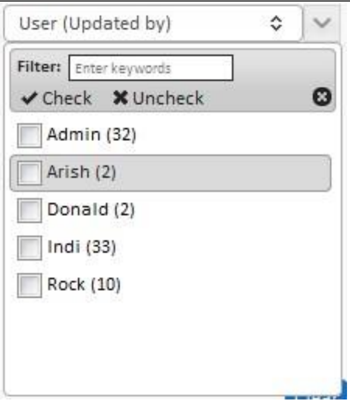
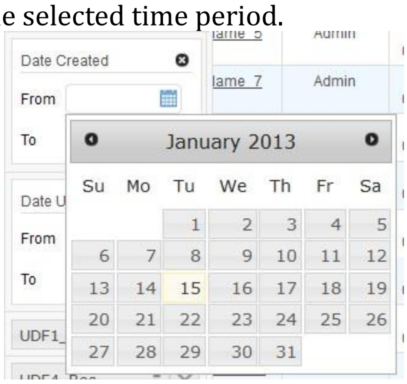
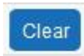






User can select or unselect all the items of the list using Check or Uncheck button. The module reflects the filter selections made.</td></tr>
<tr><td>User Created by</td><td>It is used to filter the module for the ‘Created by’ field. Click on up-down arrow key. Dropdown appears:


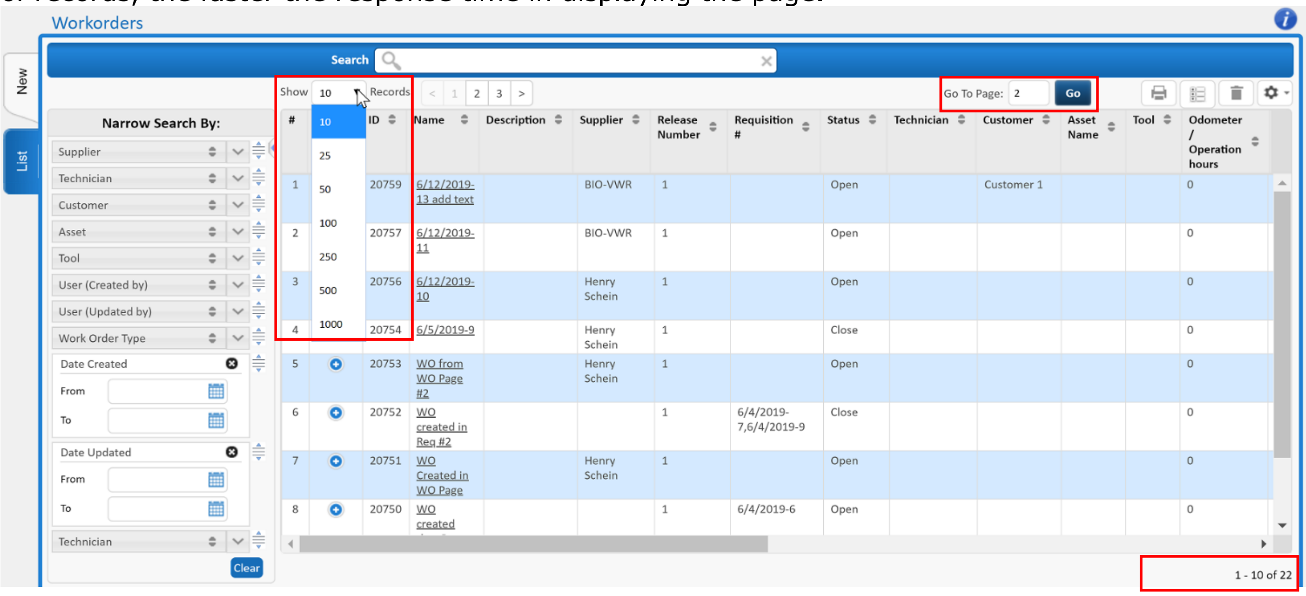
User can select or unselect all the items of the list using Check or Uncheck button. The module reflects the filter selections made.</td></tr>
</table>

User Updated by	It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. 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. Dropdown appears:
	 **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 searches will work.

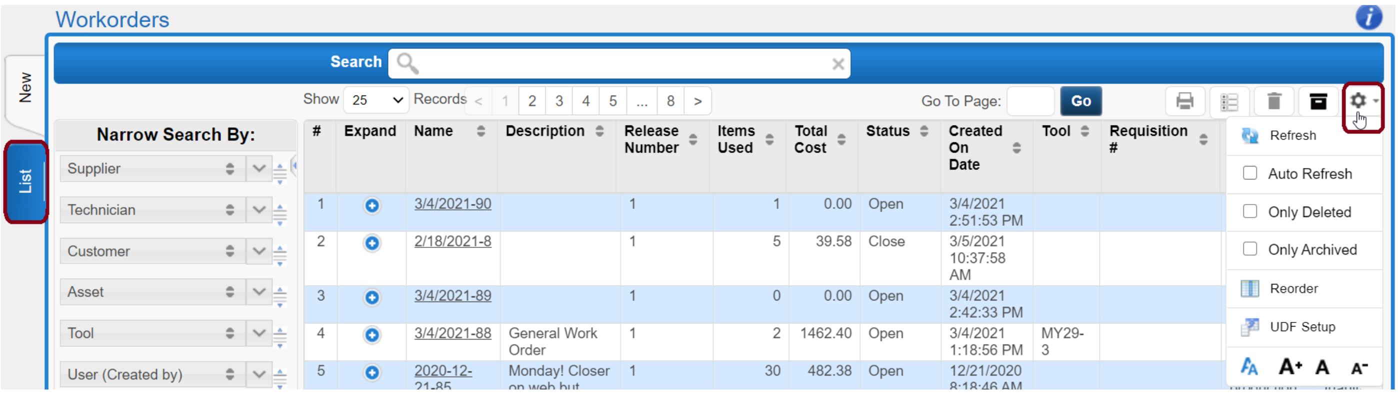
18. Display Number of Records Per Page

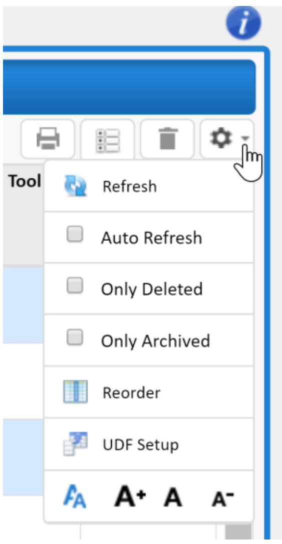
Click on the drop-down arrow to display/show the number of records per page. The smaller the number of records, the faster the response time in displaying the page.



19. Wheel Settings:

Under the List tab, point the mouse over the Wheel Settings icon to display various settings on the Work Order module.





a. Refresh

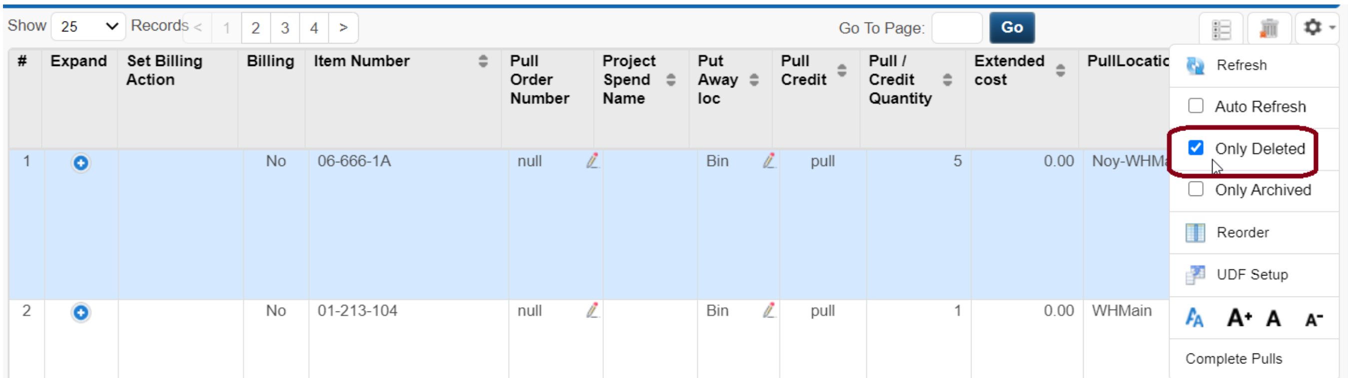
Click Refresh to displays the latest Work Order transactions and/or changes.

b. Auto Refresh

Click Auto Refresh to automatically refresh the page.

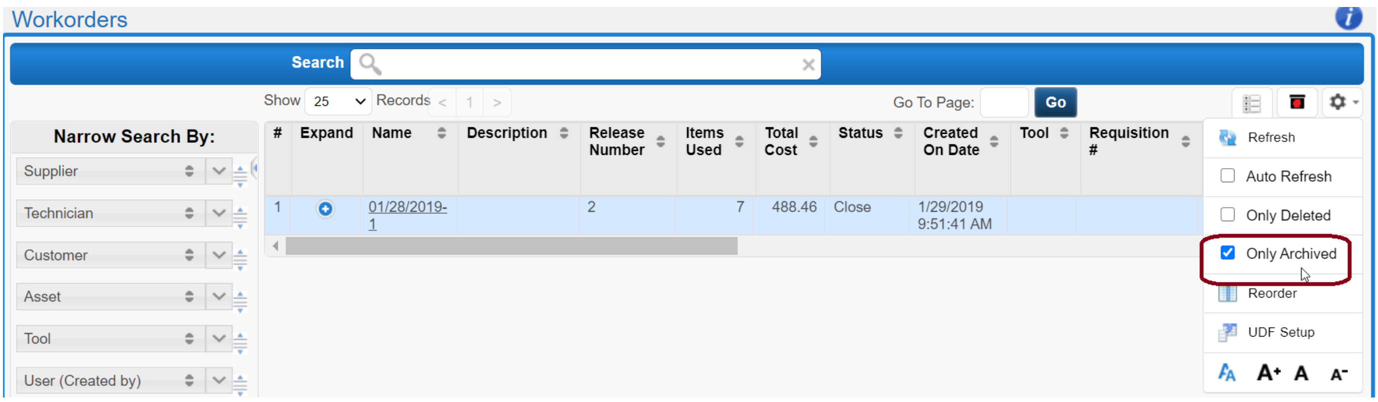
c. Only Deleted

Click Only Deleted to display only the deleted Work Order transactions.



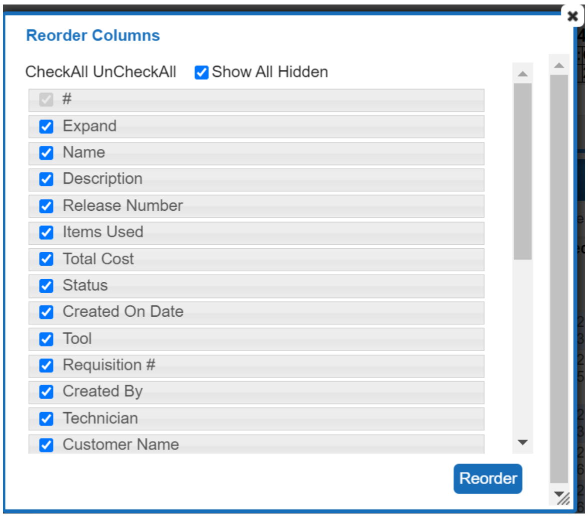
d. Only Archived

This option displays only the archived Work Order(s). To select, check the box Only Archived. Only Archived

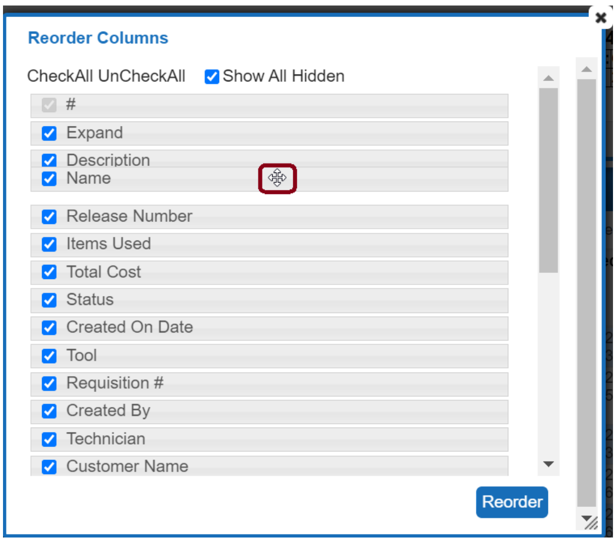


e. Reorder

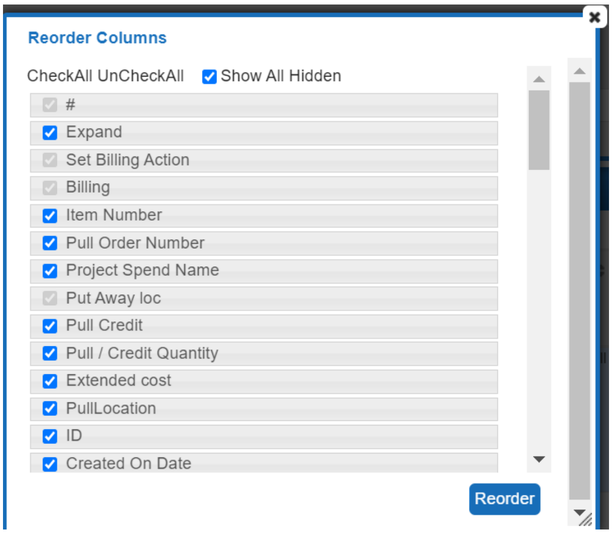
This option enables the user to reorder the columns of the module. Click on the Reorder icon and the reorder columns option will be displayed.



- The user may drag and drop the fields to be arranged in the order of choice. Using the mouse, click and hold onto the row to rearrange, the four-arrow icon will appear, drop the row in the order of choice and click on the Reorder button.



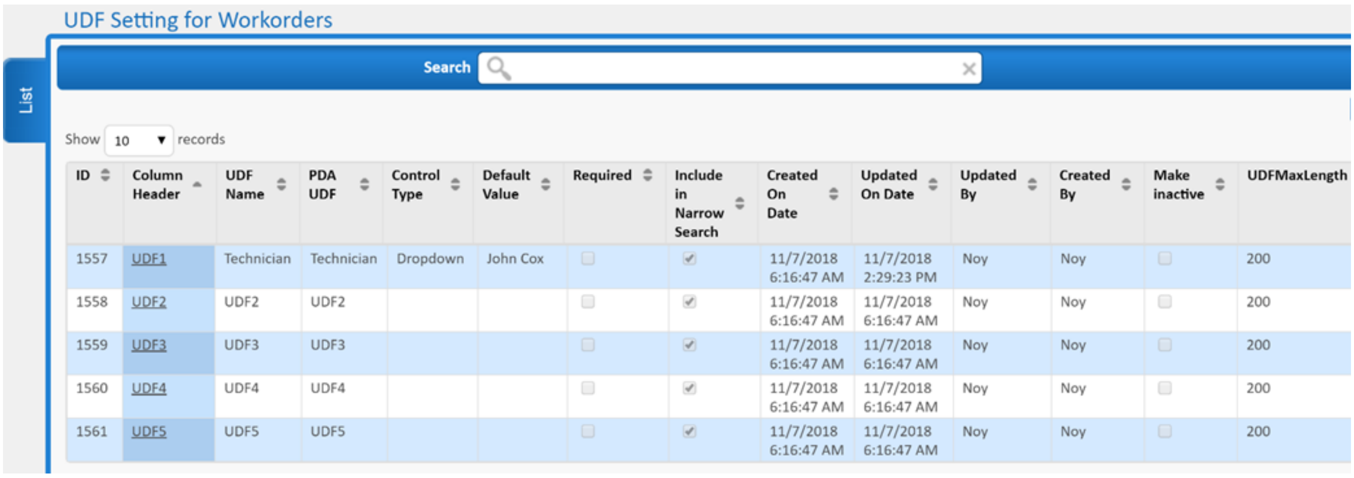
- The user can also select which fields are displayed or hidden. Check or uncheck the box corresponding to a field to display or hide, then click on the Reorder button. Click *CheckAll* to display all fields or *UnCheckAll* to hide all fields, then click the Reorder button.



Note: Click the Reorder button to apply the selection(s).

f. UDF Setup

Setup to 10 User Defined Fields to further describe each Work Order transaction. The UDF will be available in the Narrow Search option when setup.



UDF Setting for Workorders

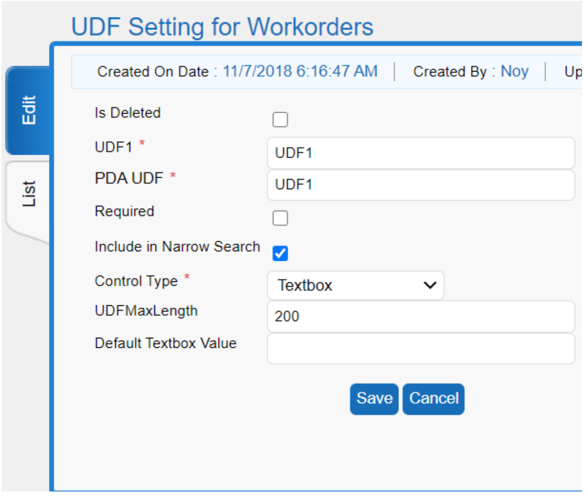
List

Search

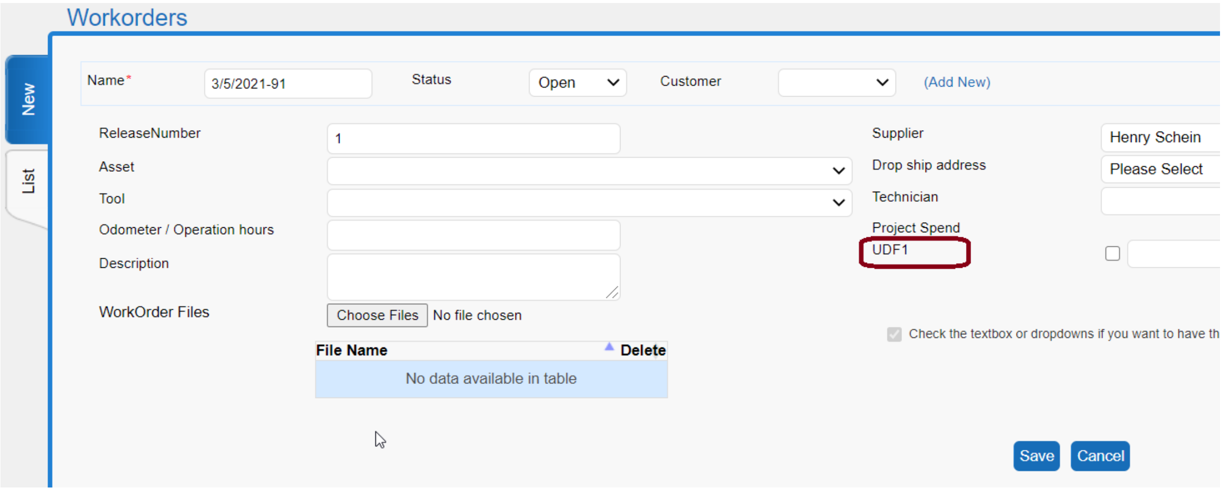
Show 10 records

ID	Column Header	UDF Name	PDA UDF	Control Type	Default Value	Required	Include in Narrow Search	Created On Date	Updated On Date	Updated By	Created By	Make inactive	UDFMaxLength
1557	UDF1	Technician	Technician	Dropdown	John Cox	☐	☑	11/7/2018 6:16:47 AM	11/7/2018 2:29:23 PM	Noy	Noy	☐	200
1558	UDF2	UDF2	UDF2			☐	☑	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	☐	200
1559	UDF3	UDF3	UDF3			☐	☑	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	☐	200
1560	UDF4	UDF4	UDF4			☐	☑	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	☐	200
1561	UDF5	UDF5	UDF5			☐	☑	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	☐	200

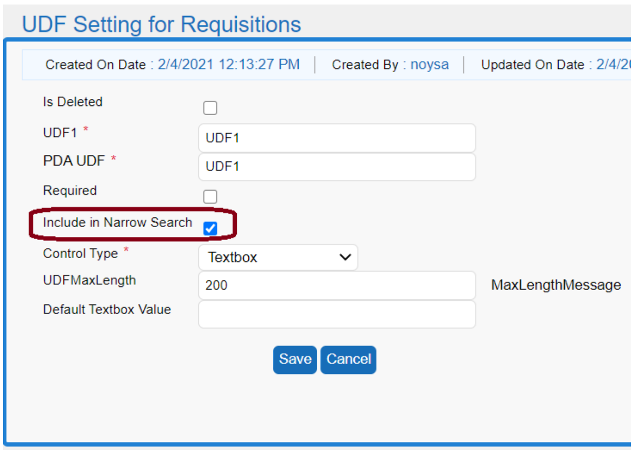
- Click on UDF column header name to define the UDF and save.



- The UDF will be displayed when a Work Order transaction is created.



- The UDF can also be included in the Narrow Search by checking the box Include in Narrow Search.



g. Fonts A+, A, A-

Allows the user to increase or decrease the font size from Large (A+), medium (A) to small (A-). Click on 

to choose the font size.

20. Miscellaneous settings:

The Grid in the List tab has the following functionality:

1) Resizing of columns
2) Re-ordering of columns using drag & drop of the column header
3) Single column and multi column sorting (using shift key)
4) Multi selection of rows by clicking each row