



eTurns

Work Orders

Help documentation



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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.

The screenshot shows the eTurns software interface. At the top, there's a navigation bar with 'Reports', 'Dashboard', 'Administration', and 'Poll All'. Below that is a toolbar with icons for 'Inventory', 'Consume' (highlighted with a red box), 'Replenish', 'Asset', 'Kits', and 'Scripts'. The release version is 'Release:4.6.72.0'. On the right, there's a status bar showing 'Idle Timer: Current Pacific Standard Time: Current UTC Time: Offset: 2021-02-25 13:23:35 2021-02-25 21:23:35-08:00:00'. The main area is titled 'Workorders' and shows a list of work orders. A context menu is open over the first row, with 'Work Orders' selected. The 'New' tab is highlighted in the list view.

2. Create a Work Order – with General Details

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

This screenshot shows the same eTurns interface as the previous one, but with some changes. The 'Stockroom' dropdown now shows 'NoyStock Rm'. The main grid displays a single work order entry with the following details:

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #	Created By	Technician	Customer Name
1	+	2020-12-21-85	Monday! Closer on web but added item on	1		30	482.38	Open	12/21/2020 8:18:46 AM		noy production	Tech1 Juanita Guadal	

- The Work Order header will be displayed.

Workorders

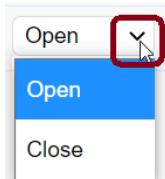
New

Name*	3/2/2021-88	Status	Open	Customer	(Add New)
ReleaseNumber	1	Supplier	Henry Schein		
Asset		Drop ship address	Please Select		
Tool		Technician			
Odometer / Operation hours		Project Spend			
Description					
WorkOrder Files	<input type="button" value="Choose Files"/> No file chosen File Name <input type="text"/> ▲ Delete No data available in table				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

- Enter or select the fields that are applicable and then click the “Save” button.
 - 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 identify the Work Order. If duplicate Work Order names are allowed in the Supplier setup page, it will be differentiated by the Release Number.

Name*

- 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.



- 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.

Customer 1

Customer

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

ReleaseNumber

- 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.

Henry Schein

3333-PH-Fisher

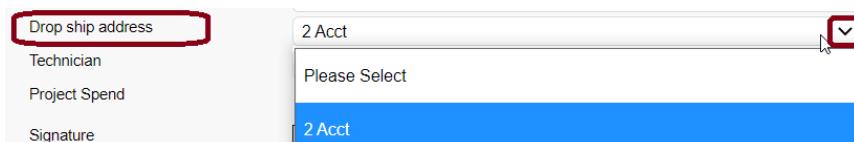
3334-BIO-Fisher



- 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.



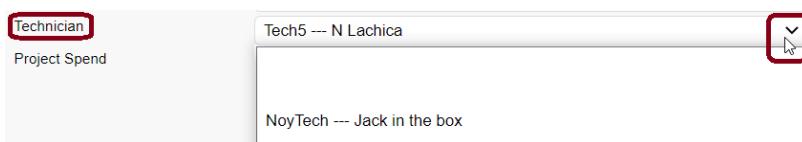
- g. **Drop ship Address** – click on the drop-down arrow to select a Drop Ship Address (if applicable). This is the drop ship address of the Supplier for the Work Order.



- 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.

A screenshot of a software interface showing an input field for 'Odometer / Operation hours'. The value '10000' is entered in the field.

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

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

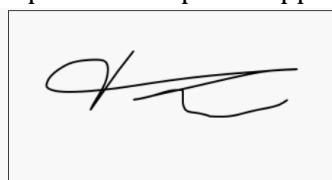
A screenshot of a software interface showing a text input field for 'Description'. The text 'General Work Order' is entered in the field.

- 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.

Signature



- 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.

Add Items to WorkOrder - 3/4/2021-10

Add Items to WorkOrder - 3/4/2021-10											
Search <input type="text"/> Go To Page: <input type="button" value="Go"/> Pull <input type="button" value="Print"/> <input type="button" value="Settings"/>											
Narrow Search By:		Pull Order Number		Project Spend Name		Putaway Bin					
Material Staging Detail	Header	Pull Button	ID	Qty to Pull	Item Number	Location	Pull Order Number	Project Spend Name	Mfg Item #	Mfg Name	Supplier Item #
Staging location		Pull	119309	10	03091967	Bin-Bin (290)					03091967
Supplier		Pull	84841	1	i2ndSep	Bin-Bin (180)					i2ndSep
Manufacturer		Pull	84814	1	01-213-104	Bin-Bin (98)					01-213-104
Category		Pull	84152	1	New Item noy	11 (3)					as
Cost:		Pull	84121	1	New Item testing 5/8/2019	11 (3)					testing
Stock Status:		Pull	84112	1	New Item testing 5/3/2019	11 (2001)					Henry Schein
Average Usage:		Pull	84083	1	i30apr	Bin-Bin (3)					i30apr
Turns:											
Item Type											
User (Created by)											
User (Updated by)											
Date Created											
From											
To											
Date Updated											

- 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.

Add Items to WorkOrder - 3/4/2021-10

Add Items to WorkOrder - 3/4/2021-10											
Search <input type="text"/> Go To Page: <input type="button" value="Go"/> Pull <input type="button" value="Print"/> <input type="button" value="Settings"/>											
Narrow Search By:		Pull Order Number		Project Spend Name		Putaway Bin					
Material Staging Detail	Header	Pull Button	ID	Qty to Pull	Item Number	Location	Pull Order Number	Project Spend Name	Mfg Item #	Mfg Name	Supplier Item #
Staging location		Pull	119309	10	03091967	Bin-Bin (290)					03091967
Supplier		Pull	84841	1	i2ndSep	Bin-Bin (180)					i2ndSep
Manufacturer		Pull	84814	1	01-213-104	Bin-Bin (98)					01-213-104
Category		Pull	84152	1	New Item noy	11 (3)					as
Cost:		Pull	84121	1	New Item testing 5/8/2019	11 (3)					testing
Stock Status:		Pull	84112	1	New Item testing 5/3/2019	11 (2001)					Henry Schein
Average Usage:		Pull	84083	1	i30apr	Bin-Bin (3)					i30apr
Turns:											
Item Type											
User (Created by)											
User (Updated by)											
Date Created											
From											
To											
Date Updated											

- Click “OK”.





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

Add Items to WorkOrder - 3/4/2021-10

Search <input type="text"/>											
Show 10	Records < 1 2 3 4 5 ... 8 >	Pull Order Number		Project Spend Name		Putaway Bin					
Use this <input type="checkbox"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>					
Pull Button	ID	Qty to Pull	Item Number	Location	Pull Order Number	Project Spend Name	Mfg Item #	Mfg Name	Supplier Item #	Supplier	UPC
Pull	119309	10	03091967	Bin-Bin (290)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	03091967	Henry Schein	
Pull	84841	1	i2ndSep	Bin-Bin (180)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	i2ndSep	Henry Schein	
Pull	84814	1	01-213-104	Bin-Bin (98)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	01-213-104	Henry Schein	
Pull	84152	1	New Item noy	11 (3)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	as	Henry Schein	
Pull	84121	1	New Item testing 5/8/2019	11 (3)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	testing	Henry Schein	
Pull	84112	1	New Item testing 5/3/2019	11 (2001)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	testing	Henry Schein	
Pull	84083	1	i30apr	Bin-Bin (3)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	i30apr	Henrv	

1 - 10 of 79

- 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.

Workorders

Room : Noy LAF Cardiology Created On Date : 3/4/2021 2:58:39 PM Created By : noysa Updated On Date : 3/4/2021 3:17:31 PM Updated By : noysa																																																																																									
Edit		List																																																																																							
<input checked="" type="radio"/> Name*	<input type="text" value="3/4/2021-10"/>	Status	<input style="outline: 2px solid red; border-radius: 5px;" type="button" value="Open"/> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Customer"/>	(Add New) <input style="outline: 2px solid red; border-radius: 5px;" type="button" value="Save"/> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Cancel"/>																																																																																					
<input style="outline: 2px solid red; border-radius: 5px;" type="button" value="New Item"/> <input style="outline: 2px solid red; border-radius: 5px;" type="button" value="New Tool"/>																																																																																									
Items Used : 2 Total Sell Price : \$ 44.00																																																																																									
<table border="1"> <thead> <tr> <th colspan="12">Search <input type="text"/></th> </tr> <tr> <td>Show 10</td> <td>Records < 1 2 3 4 5 ... ></td> <td colspan="2">Go To Page:</td> <td colspan="2">Go</td> <td colspan="2"><input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Delete"/></td> <td colspan="4"><input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Settings"/></td> </tr> <tr> <th>#</th> <th>Action</th> <th>Pull Credit</th> <th>Pull / Credit Quantity</th> <th>Pull Order Number</th> <th>Extended cost</th> <th>Tool Location</th> <th>Project Spend Name</th> <th>ID</th> <th>Item Number</th> <th>Tool</th> <th>Created Date</th> <th>Updated Date</th> <th>Room</th> <th>Updated By</th> <th>Created By</th> <th>Item Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input checked="" type="radio"/></td> <td>pull</td> <td></td> <td>1</td> <td>0.00</td> <td>Bin-Bin</td> <td></td> <td>71066</td> <td>i2ndSep</td> <td></td> <td>3/4/2021 3:17:31 PM</td> <td>3/4/2021 3:17:31 PM</td> <td>Noy LAF Cardiology</td> <td>noysa</td> <td>noysa</td> <td>Item</td> <td></td> </tr> <tr> <td>2</td> <td><input checked="" type="radio"/></td> <td>pull</td> <td></td> <td>10</td> <td>44.00</td> <td>Bin-Bin</td> <td></td> <td>71065</td> <td>03091967</td> <td></td> <td>3/4/2021 3:17:29 PM</td> <td>3/4/2021 3:17:30 PM</td> <td>Noy LAF Cardiology</td> <td>noysa</td> <td>noysa</td> <td>Item</td> <td></td> </tr> </tbody> </table>												Search <input type="text"/>												Show 10	Records < 1 2 3 4 5 ... >	Go To Page:		Go		<input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Delete"/>		<input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Settings"/>				#	Action	Pull Credit	Pull / Credit Quantity	Pull Order Number	Extended cost	Tool Location	Project Spend Name	ID	Item Number	Tool	Created Date	Updated Date	Room	Updated By	Created By	Item Type	Description	1	<input checked="" type="radio"/>	pull		1	0.00	Bin-Bin		71066	i2ndSep		3/4/2021 3:17:31 PM	3/4/2021 3:17:31 PM	Noy LAF Cardiology	noysa	noysa	Item		2	<input checked="" type="radio"/>	pull		10	44.00	Bin-Bin		71065	03091967		3/4/2021 3:17:29 PM	3/4/2021 3:17:30 PM	Noy LAF Cardiology	noysa	noysa	Item	
Search <input type="text"/>																																																																																									
Show 10	Records < 1 2 3 4 5 ... >	Go To Page:		Go		<input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Delete"/>		<input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; line-height: inherit; text-decoration: none;" type="button" value="Settings"/>																																																																																	
#	Action	Pull Credit	Pull / Credit Quantity	Pull Order Number	Extended cost	Tool Location	Project Spend Name	ID	Item Number	Tool	Created Date	Updated Date	Room	Updated By	Created By	Item Type	Description																																																																								
1	<input checked="" type="radio"/>	pull		1	0.00	Bin-Bin		71066	i2ndSep		3/4/2021 3:17:31 PM	3/4/2021 3:17:31 PM	Noy LAF Cardiology	noysa	noysa	Item																																																																									
2	<input checked="" type="radio"/>	pull		10	44.00	Bin-Bin		71065	03091967		3/4/2021 3:17:29 PM	3/4/2021 3:17:30 PM	Noy LAF Cardiology	noysa	noysa	Item																																																																									

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.

Pull Button	ID	Qty to Pull	Item Number	Location	Pull Order Number	Project Spend Name	Mfg Item #	Mfg Name	Supplier Item #	Supplier Name
Pull	119309	10	03091967	Bin-Bin (280)						03091967
Pull	83880	1	3950376	C2S1P02 (27)			260	Graham Medical	3950376	
Pull	83869	1	1125634	NMS3P07 (1206)			1125634	Henry Schein Inc.	1125634	

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.

Suppliers

Search <input type="text"/>									
Show 10 Records < 1 2 > Go To Page: Go									
Narrow Search By:	#	ID	Supplier	Description	Address	City	State	Zip Code	Country
User (Created by)	6	11512	BIO-VWR		19700 Fairchild	Irvine	CA	92612	United States
User (Updated by)									
Date Created									

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

Suppliers

Room : NoyStock Rm | Created On Date : 9/14/2018 11:47:43 AM | Created By : noy production | Updated On Date : 11/6/2020 10:40:36 AM | Updated By : noysa

General Details	BlanketPO Details
Supplier Name * BIO-VWR	Add BlanketPO
Supplier Color * #eeece1	Blanket PO Start Date End date Maximum Order Line Limit Do Not Exceed Max C
Description	Blanket PO: 7/1/2019 12/31/2021
Branch Number	
Maximum Order Size	
Default Order Required Days	
Address Details	Account Details
Address 19700 Fairchild	Add Account
City Irvine	AccountNo AccountName Address City State Zip Code Country ShipToID IsD
State CA	5678 Account
Zip Code 92612	
Country United States	
Contact * Jack	
Phone * 9495564796	
Fax 9495551212	
Email	
PO Sequence Detail	
PO Auto Sequence Blank	
Last Used Order Number 89	
Pull Purchase Number Type Date + Incrementing #	
Last Pull Purchase Number 148 Used	

- 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.

Add Items to WorkOrder - 3/4/2021-10

Search <input type="text"/>									
Show 10 Records < 1 2 3 4 5 ... 8 > Go									
Narrow Search By:		Pull Order Number		Project Spend Name		Putaway Bin			
Material Staging Detail	Use this <input checked="" type="checkbox"/>	Pull Button	ID 123	Location	Pull Order Number	Project Spend Name			
Header			2/22/2021-1						
Staging location			24						
Supplier			25						
Manufacturer			3/19/2019-1						
Category			3/29/2019-1						
Cost:									
Stock Status:									
Average Usage:									
Turns:									

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 not 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.

Add Items to WorkOrder - 3/4/2021-10

Narrow Search By:							Search <input type="text"/>	Go To
Material Staging Detail		Pull Order Number		Project Spend Name		Putaway Bin		
Header		Pull Order Number		Project Spend Name				
Staging location		Pull Button	ID	Qty to Pull	Item Number	Location	Pull Order Number	Project Spend Name
Supplier								
Manufacturer								
Category								
Cost:								
Stock Status:								
Average Usage:								
Turns:								
Item Type								
User (Created by)								
User (Updated by)								
Date Created		<input type="button" value="From"/>						
		<input type="button" value="To"/>						

Use this

Pull Order Number: 123

2/22/2021-1
24
25
3/19/2019-1
3/29/2019-1
4/2/2019-1
4/25/2019-1
4/9/2019-1
5/13/2019-1
5/3/2019-1
5/9/2019-1
6/10/2020-1

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.

Project Spend Name *: Noy Project A
 Description: Project A dollar limitation
 Dollar Limit Amount *: 999999999.00
 Dollar Used Amount: 115.55
 Track All Usage Against This Project:
 Is Closed:

- 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.

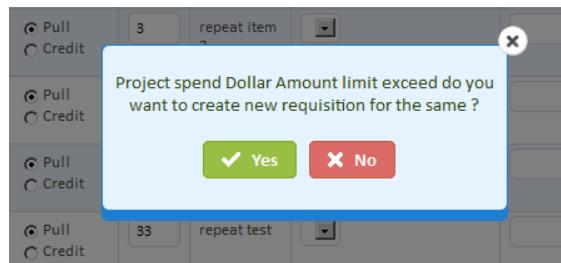
Pull Button	ID	Qty to Pull	Item Number	Location	Pull Order Number	Project Spend Name
Pull	84819	1	Test1	Shelf (1049)		

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

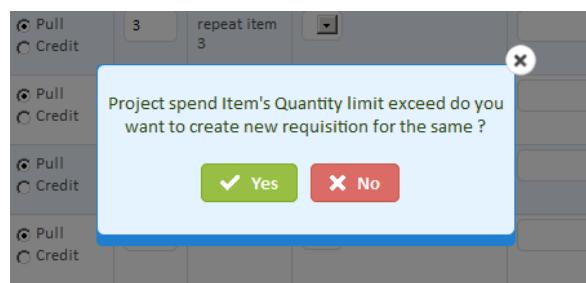
Pull Button	ID	Qty to Pull	Image	Item Number	Location	Pull Order Number	Project Spend Name	Mfg Item #
Pull	71360	1		01-213-104	WHMain (1003)		1212 Noy Proj Spend D Noy Project A Proj Spend C Project B	1212
Pull	71361	5		06-666-1A	Noy-WHMain (1)			

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

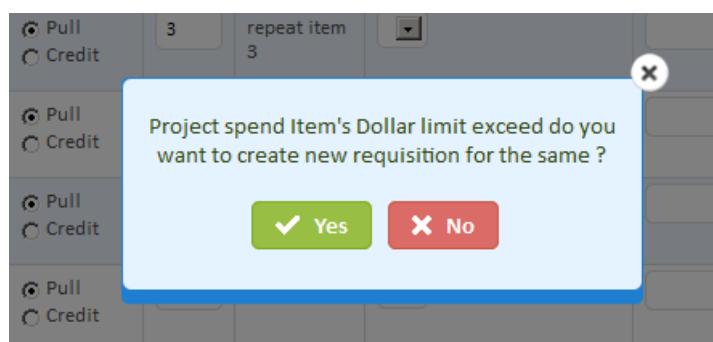
- Project Level Amount Restriction:** If the pulled items exceed the Dollar amount limit defined in the Project spend, this restriction appears on screen: "Project spend Dollar Amount limit exceed do you want to create new requisition for the same?"



- 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".



- 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.

New Consume Pull

#	Pull Button	Item Number	Description	Qty to Pull	On Hand Quantity	Location	Suggested Order Quantity	On Order Quantity	UDF1	Pull Order Number
1	Pull	Test1		1	1049	Shelf (1049)	0	0	123	123
2	Pull	test consigned qty		1	502	Shelf (502)	0	0	123	123
3	Pull	456	Nexus	1	494	Shelf (494)	0	0		

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

Pull

#	Expand	Set Billing Action	Billing	Pull Order Number	Pull Credit	Pull / Credit Quantity	Extended cost	Pull Location	Project Spend Name	ID	Item Number
1		No		pull	76	156.56	Warehouse	New Proj Spend	57600	WIRJSOO14/31	
2		No		pull	1	129.95	Warehouse	New Proj Spend	57599	ZSTN22/4	

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

UDF Setting for Pull

ID	Column Header	UDF Name	PDA UDF	Control Type	Default Value	Required	Include in Narrow Search
1843	UDF1	UDF1	UDF1	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1844	UDF2	UDF2	UDF2		<input type="checkbox"/>	<input checked="" type="checkbox"/>	



- 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".

UDF Setting for Pull

Created On Date : 5/22/2019 6:14:22 AM | Created By : noy produc

Is Deleted	<input type="checkbox"/>
UDF1 *	UDF1
PDA UDF *	UDF1
Required	<input type="checkbox"/>
Include in Narrow Search	<input checked="" type="checkbox"/>
Control Type *	Textbox
UDFMaxLength	200
Default Textbox Value	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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

New Consume Pull

Search

Show 10 | Records < 1 2 3 4 5 ... 15 > Go To Page:

Narrow Search By:		Pull Order Number	Project Spend Name	UDF1							
		#	Pull Button	Item Number	Description	Qty to Pull	On Hand Quantity	Location	Suggested Order Quantity	On Order Quantity	UDF1
<input type="checkbox"/> Use this		1	<input type="button" value="Pull"/>	Test1		1	1049	Shelf (1049)	0	0	
		2	<input type="button" value="Pull"/>	test consigned qty		1	502	Shelf (502)	0	0	
		3	<input type="button" value="Pull"/>	456	Nexus	1	494	Shelf (494)	0	0	

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.

New Consume Pull

Search

Show 10 | Records < 1 2 3 4 5 ... 6 > Go To Page: Go

Narrow Search By:		Pull Order Number	Project Spend Name	UDF1							
		#	Pull Button	Item Number	Description	Qty to Credit	On Hand Quantity	Location	Suggested Order Quantity	On Order Quantity	UDF1
<input type="checkbox"/> Use this		1	<input type="button" value="Credit"/>	Test1		0	1049	Shelf	0	0	
		2	<input type="button" value="Credit"/>	test consigned qty		0	502	Shelf	0	0	
		3	<input type="button" value="Credit"/>	456	Nexus	0	494	Shelf	0	0	
		4	<input type="button" value="Credit"/>	ZSTN22/4	TOOLS	0	563	Warehouse	0	0	



- 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).

New Consume Pull

#	Pull Button	Qty to Credit	Item Number	Description	On Hand Quantity	Project Spend Name	Location	Supplier	Suggested Order Quantity	On Order Quantity	Pull Order Number	Minimum Quantity
1	Credit	1	01-213-104	25ft Aluminum Foil 4	1940		WHMain	BIO-VWR	0	0		
2	Credit	0	06-666-1A	Large Kimwipes	570		Bin		0	0		
3	Credit	0	1001570	Sponge Gauze All-Gauze Cotton/Woven 2x2" 12 Ply NS LF 200/Bg, 40 Boxes	2536		C1S3P1 Iran		0	0		

Search Go To Page: Credit

Narrow Search By:

- Supplier
- Manufacturer
- Category
- Cost:
- Stock Status:
- Average Usage:
- Turns:
- Item Type
- User (Created by)
- User (Updated by)
- Date Created

- 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.

Credit All

8	Credit	THSCI806	CONNECT, FITT & OUT/BOXES	0	500	Warehouse	0	0			200	
9	Credit	THSCI1004	CONNECT, FITT & OUT/BOXES	0	1850	Warehouse	0	0			500	
10	Credit	THSBC72171K	CONNECT, FITT & OUT/BOXES	0	588	Warehouse	0	0			200	

1 - 10 of 58

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.

New Consume Pull

#	Pull Button	Item Number	Description	Qty to MS Credit	On Hand Quantity	Location	Suggested Order Quantity	On Order Quantity	UDF1	Pull Order Number	Credit Minimum Quantity	Maxin Quant
1	Credit MS	ZSTN22/4	TOOLS	0	561		0	0			200	

Search Go To Page: Credit MS

Narrow Search By:

- Material Staging Detail Header
- Staging location
- Supplier
- Manufacturer
- Category
- Cost:



- 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).

New Consume Pull

#	Pull Button	Item Number	Description	Qty to MS Credit	On Hand Quantity	Location	Suggested Order Quantity	On Order Quantity	UDF1	Pull Order Number	Minimum Quantity	Maxir Quan
1	Credit MS	ZXYREB	OTHER PRODUCTS	1	625	Staging B	0	0			200	
2	Credit MS	ZSTN22/4	TOOLS	1	560	More Locations	0	0			200	
3	Credit MS	WIRSOOW14/376	WIRE & CABLE	1	396		0	0			200	
4	Credit MS	WIRNMD3/3	WIRE & CABLE	0	499	Staging B	0	0			200	
5	Credit MS	WIRNMD2/2RED	WIRE & CABLE	0	499	Staging B	0	0			200	
6	Credit MS	WIRNMD14/3150	WIRE & CABLE	0	499	Staging B	0	0			200	

MS Credit All

- 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.

2	Credit MS	ZSTN22/4	TOOLS	1	560	More Locations	0	0			200
3	Credit MS	WIRSOOW14/376	WIRE & CABLE	1	396		0	0			200
4	Credit MS	WIRNMD3/3	WIRE & CABLE	0	499	Staging B	0	0			200
5	Credit MS	WIRNMD2/2RED	WIRE & CABLE	0	499	Staging B	0	0			200
6	Credit MS	WIRNMD14/3150	WIRE & CABLE	0	499	Staging B	0	0			200

MS Credit All

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 screenshot shows the application's main menu bar with 'Reports', 'Dashboard', 'Inventory', 'Consume', and 'Replenish' buttons. Below the menu is a dropdown for 'Administration' which is expanded to show 'Authentication', 'Site Configuration', 'Supporting Information' (which is highlighted with a red box), and 'Bill Of Material'. A secondary dropdown for 'Supporting Information' is also expanded, showing 'General Data', 'Address Details', and 'Suppliers' (which is highlighted with a red box). A tooltip for 'Suppliers' says 'Add new' and 'List'. On the left, there are buttons for 'Edit', 'List', and 'Change Log'.

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

The screenshot shows a table titled 'Suppliers' with a search bar at the top. The table has columns for '#', 'ID', 'Supplier', 'Description', 'Address', 'City', 'State', 'Zip Code', and 'Country'. A row is selected for supplier ID 11512, whose name is 'BIO-VWR' (highlighted with a red box). Other columns for this row include '19700 Fairchild', 'Irvine', 'CA', '92612', and 'United States'. On the left, there is a 'Narrow Search By:' section with dropdowns for 'User (Created by)', 'User (Updated by)', and 'Date Created', and a 'Show' dropdown set to '10 Records'.

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

The screenshot shows the 'Suppliers' page for supplier ID 11512. It includes sections for 'General Details', 'BlanketPO Details', and 'Account Details'. In the 'General Details' section, fields like 'Supplier Name' (BIO-VWR), 'Supplier Color' (#eeeece), 'Description', 'Branch Number', 'Maximum Order Size', and 'Default Order Required Days' are filled. In the 'BlanketPO Details' section, a table shows a single row for a 'Blanket PO' with start date 7/1/2019 and end date 12/31/202t. In the 'Account Details' section, a table shows a single row for an account with account number 5678 and account name 'Account'. A checkbox labeled 'IsD' is checked.



- 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.

New Consume Pull

The screenshot shows the 'New Consume Pull' interface. At the top, there's a search bar and navigation buttons. Below it, a 'Narrow Search By:' section contains dropdowns for Material Staging Detail Header, Staging location, Supplier, Manufacturer, Category, Cost, and Stock Status. The main table has columns for #, Pull Button, Qty to Pull, Item Number, Description, On Hand Quantity, Project Spend Name, Location, Supplier, and Supplier Account Number. The 'Supplier Account Number' column is highlighted with a red box. Two rows of data are visible: Row 1 shows a pull of 1 unit for item 01-213-104, description '25ft Aluminum Foil 4', quantity 1940, location WHMain, supplier BIO-VWR, and account number 5678. Row 2 shows a pull of 5 units for item 06-666-1A, description 'Large Kimwipes', quantity 570, location Noy-WHM, supplier Henry Schein, and account number 5678.

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.

The screenshot shows the 'Workorders' page. At the top, there's a header with the eTurns logo, company name 'Enterprise Logo', and release information 'Release: 4.6.73.0'. Below the header, there are tabs for Inventory, Consume (highlighted with a red box), Replenish, Asset, Kits, and Scripts. A 'Stockroom: NoyWarehouse' dropdown is also present. The main area shows a table of work orders with columns for #, Expand, Name, Description, Release Number, Items Used, Total Cost, Status, Created On Date, Tool, Requisition #, Created By, and Technical. The 'Work Orders' tab is selected. A red box highlights the 'Work Orders' tab. The table lists three work orders: one for 2/18/2021, one for 8/30/2020, and one for 5/28/2019.

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

The screenshot shows a detailed view of a work order. On the left, there are 'New' and 'List' buttons. The main area has a 'Search' bar and a table with columns for #, Expand, Name, Description, Release Number, Items Used, Total Cost, Status, Created On Date, Tool, Requisition #, Created By, and Technical. A red box highlights the 'Expand' button for the first work order. Below the main table, there's a smaller table with columns for #, Pull Credit, Pull / Credit Quantity, ID, History ID, Item Number, Tool, Created Date, Updated Date, Added From, Edited From, Received On Date, and R.O.D. The first row of this table corresponds to the expanded work order above.

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

#	Expand	Name	Description	Release Number
1		2/18/2021-8		1
2		8/30/2020-7		1
3		5/28/2019-6		1

- 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.

The screenshot shows the 'Workorders' application interface. At the top, there's a header with room information and a toolbar with various buttons. Below the header, there's a form for creating a new work order, with fields for Name, Status (set to Open), and Customer. Buttons for 'New Item' and 'New Tool' are visible. A modal window is open over the form, showing options 'Open' and 'Close'. Below the form, a message indicates 'Items Used: 2 | Total Sell Price: \$ 44.00'. The main area contains a grid of pulled items. The grid has columns for #, Action, Pull Credit, Pull Credit Quantity, Pull Order Number, Extended cost, Tool Location, Project Spend Name, ID, Item Number (which is highlighted with a red box), Tool, Created Date, Updated Date, Room, Updated By, Created By, Item Type, and Description. Two rows of data are visible in the grid.

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.

This screenshot shows the 'Workorders' application with the 'List' tab selected. The interface includes a search bar at the top and a 'Narrow Search By:' section with dropdowns for Supplier, Technician, Customer, Asset, and Tool. The main area displays a grid of work orders. One specific row is highlighted with a dark blue background, indicating it is selected for deletion. To the right of the grid, there are several icons, including a delete icon which is highlighted with a red box and a red arrow pointing towards it from the bottom right.



- Click yes when prompted to continue.

The screenshot shows a list of work orders with various columns including ID, Name, Description, Supplier, Release Number, Requisition #, Status, Technician, Customer, Asset Name, Tool, Odometer / Operation hours, Items Used, Total Cost, and Room. A confirmation dialog box is overlaid on the screen, asking 'Are you sure you want to continue?' with 'Yes' and 'No' buttons.

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

The screenshot shows a list of work orders with various columns including ID, Name, Description, Supplier, Release Number, Requisition #, Status, Technician, Customer, Asset Name, and Ass Nar. A success message '1 record(s) deleted successfully.' is displayed in the bottom right corner of the list area.

Note: Deleting Work Order(s) does not 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.

The screenshot shows a list of work orders with various columns including ID, Name, Description, Release Number, Items Used, Total Cost, Status, Created On Date, Tool, Requisition #, Created By, and Technician. The settings menu in the top right corner has a checked box for 'Only Deleted'. Other options in the menu include 'Auto Refresh', 'Reorder', 'UDF Setup', and size adjustment buttons.



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

Screenshot of the Workorders list page. A red arrow points to the trashcan icon in the top right corner of the header. Another red arrow points to the fourth row, which is highlighted in pink, indicating it is selected for undeletion.

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #	Created By	Technician	Customer Name
1		5/28/2019-6			1	2	544.25	Close	5/28/2019 1:34:02 PM		noy production		
2		5/28/2019-5			1	0	0.00	Close	5/28/2019 1:29:29 PM		noy production		
3		5/28/2019-4			1	0	0.00	Close	5/28/2019 1:09:01 PM		noy production		
4		4/12/2019-1			1	0	0.00	Open	4/12/2019 11:52:59 AM		noy production		

- Click yes when prompted.

Screenshots showing the confirmation dialog and success message for undeleting a record.

Confirmation Dialog:

Are you sure you want to undelete selected record(s)?

Yes No

Success Message:

Record(1) undeleted successfully.

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.

#	Expand	Name	Description	Release Number	Items Used
1		2/18/2021-8			1
2		8/30/2020-7			2

Workorders

Room : NoyWarehouse | Created On Date : 2/18/2021 3:59:12 PM | Created By : noysa | Updated On Date : 2/18/2021 3:59:25 PM | Updated By : noysa

Name* 2/18/2021-8 Status Open Customer (Add New)

New Item

Items Used : 1 | Total Sell Price : \$ 129.95

Search

Show 10 Records < 1 > Go To Page:

#	Action	Pull Credit	Pull / Credit Quantity	Pull Order Number	Extended cost	Tool Location	Project Spend Name	ID	Item Number	Tool	Created Date	Updated Date
1		pull	1		129.95	Warehouse		70961	ZSTN22/4		2/18/2021 3:59:24 PM	2/18/2021 3:59:25 PM



- 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 o Item quantities from deleted Pulls, are put back into general inventory.
- Save.

Workorders

Room : NoyWarehouse | Created On Date : 2/18/2021 3:59:12 PM | Created By : noysa | Updated On Date : 2/18/2021 3:59:25 PM | Updated By : noysa

[Edit](#) [List](#) [Change Log](#)

New Item **New Tool** **(Add New)**

Name*	2/18/2021-8	Status	Open	Customer	(Add New)
ReleaseNumber	1	Supplier	Super		
Asset		Drop ship address	12345 Main Acct		
Tool		Technician			
Odometer / Operation hours		Project Spend			
Description					
WorkOrder Files	Choose Files No file chosen				
File Name	Delete				
No data available in table					
Save Cancel					

New Item **New Tool**

Items Used : 1 | Total Sell Price : \$ 129.95

#	Action	Pull Credit	Pull / Credit Quantity	Pull Order Number	Extended cost	Tool Location	Project Spend Name	ID	Item Number	Tool	Created Date	Updated Date	Room	Updated By	Created By	Item Type
1		pull	1		129.95	Warehouse		70961	ZSTN22/4		2/18/2021 3:59:24 PM	2/18/2021 3:59:25 PM	NoyWarehouse	noysa	noysa	Item

13. Unclose a Closed Work Order

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

Workorders

Show : 50 | [Search](#)

[New](#) [List](#)

Narrow Search By:

Supplier	
Technician	
Customer	

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status
1		2/18/2021-8		1	5	316.90	Close
2		8/30/2020-Z		1	2	286.51	Open



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

Workorders

Room : NoyWarehouse | Created On Date : 2/18/2021 3:59:12 PM | Created By : noysa | Updated On Date : 3/4/2021 9:52:13 PM | Updated By : noysa

#	Action	Pull Credit	Pull / Credit Quantity	Pull Order Number	Extended cost	Tool Location	Project Spend Name	ID	Item Number	Tool	Created Date	Updated Date	Room	Updated By	Created By	Item Type
1	pull		1		129.95	Warehouse		71070	ZSTN22/4		3/4/2021 9:48:27 PM	3/4/2021 9:48:29 PM	NoyWarehouse	noysa	noysa	Item
2	pull		1		57.00	Shelf		71069	456		3/4/2021 9:48:25 PM	3/4/2021 9:48:27 PM	NoyWarehouse	noysa	noysa	Item

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

Workorders

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status
1	<input checked="" type="checkbox"/>	2/18/2021-8		1	5	316.90	Open
2	<input checked="" type="checkbox"/>	8/30/2020-7		1	2	286.51	Open

- 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).

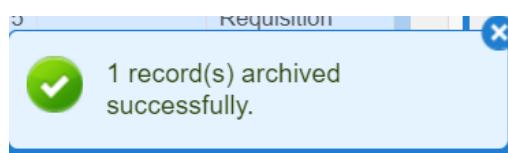
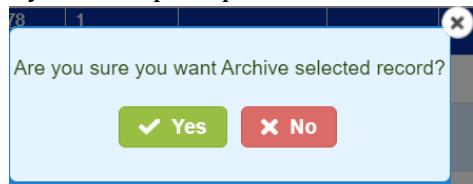
#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #	Created By
1	<input checked="" type="checkbox"/>	2/18/2021-8		1	5	316.90	Close	2/18/2021 3:59:12 PM			noysa



- Click on the archive icon.

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

- Click yes when prompted.



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

The screenshot shows the Workorders list screen with the 'Only Archived' checkbox selected in the top right corner of the header. The list table displays a single record: 2/18/2021-8, which is now marked as archived.

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

The screenshot shows a report search interface with various filters. The 'WorkOrder' filter dropdown is open, and the option 'Work Order' is highlighted with a red box. Other options in the dropdown include: Tool Audit Trail Transaction, Tool Instock, ToolAssetOrder, ToolAssetOrders With LineItems, Tools, Tools checked out, Tools Checkin-out History, Tools Checkin-Out History with Work Order Col Transfer, Transfer Rm UDF1, Transfer UDF1, Transfer With LineItems, tttt, Unfulfilled Order LineItems, and Work Order.

Report filters on the right side include:

- Start Date: 3/4/2021 00:00
- End Date: 3/4/2021 23:59
- Types: Types 2 selected
- Quantity Type: Quantity Type
- Status: Status 1 selected
- WorkOrder: 2/18/2021-8 (highlighted with a red box)



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

Workorders

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

Go To Page: Go

Narrow Search By:

Only Archived

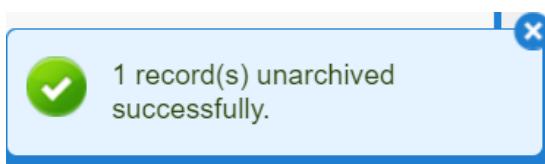
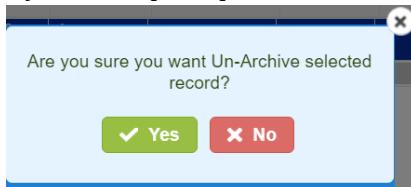
New List Change Log

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

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

Go To Page: Go

- Click yes when prompted.

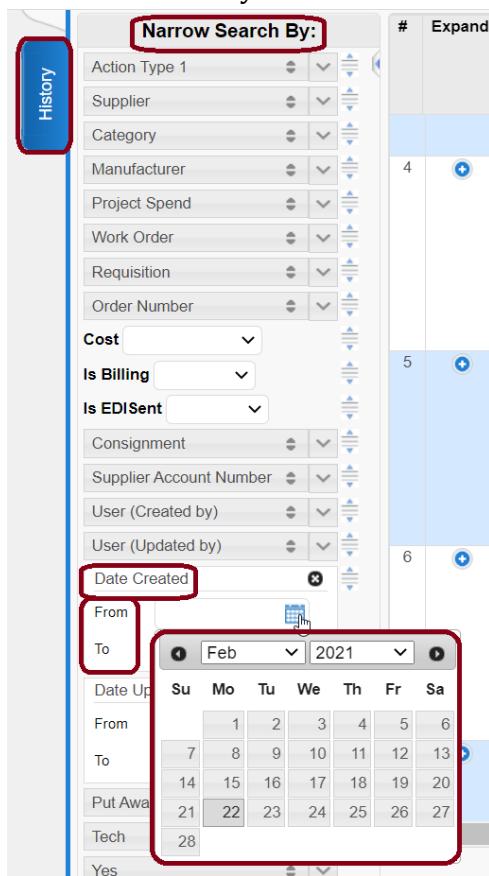


- Click on the wheel settings icon and uncheck the box Only Archived.
- This will display the unarchived record(s).

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #	Created By	Technician
1		2/18/2021-8		1	5	39.58	Close	3/5/2021 10:37:58 AM			noysa	
2		3/4/2021-90		1	1	0.00	Open	3/4/2021 2:51:53 PM			noysa	
3		3/4/2021-89		1	0	0.00	Open	3/4/2021 2:42:33 PM			noysa	
4		3/4/2021-88	General Work Order	1	2	1462.40	Open	3/4/2021 1:18:56 PM	MY29-3		noysa	NoyTech Jack in
5		2020-12-	Monday! Closer	1	30	482.38	Open	12/21/2020			noy	Tech1 -

Go To Page: Go

- 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.

#	Expand	Set Billing Action	Billing	Item Number	Pull Order Number	Project Spend Name	Put Away Loc	Pull Credit	Pull / Credit Quantity	Extended cost	Pull Location	ID	Created On Date
1	+/-		No	EATCPM230WL	null		Bin	Pull	10	1412.40	WHMain	69827	12/22/20 4:19:13
2	+/-		No	EATCPM140WL	null		Bin	Pull	10	736.90	WHMain	69826	12/22/20 4:19:13
3	+/-		No	01-213-104	null		Bin	Pull	1	0.00	WHMain	69825	12/22/20 4:19:12
4	+/-		No	01-213-104	null		Bin	Pull	1	0.00	P9.CY.R1.S3.B5	69824	12/22/20 4:19:12



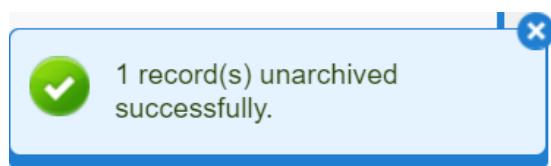
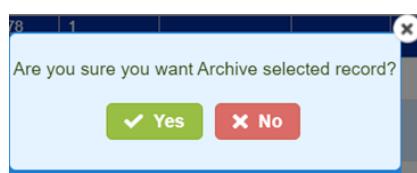
- Note the number of transactions for the date range selected. In the example it is 2,348.
- Click on the drop-down arrow under Show Records and choose the appropriate value to display all records.
- Click on the Select All icon (highlighting all records in dark blue color)

Narrow Search By:													
#	Set Billing Action	Billing Item Number	Pull Order Number	Project Spend Name	Put Away loc	Pull Credit	Pull / Credit Quantity	Extended cost	PullLocation	ID	Created On Date		
1	No	EATCPM230WL	null		Bin	Pull		10	1412.40	WHMain	69827	12/22/2020 4:19:13 PM	
2	1000	No	EATCPM140WL	null		Bin	Pull	10	736.90	WHMain	69826	12/22/2020 4:19:13 PM	
3	No	01-213-104	null		Bin	Pull		1	0.00	WHMain	69825	12/22/2020 4:19:12 PM	
4	No	01-213-104	null		Bin	Pull		1	0.00	P9.CYR1.S3.B5	69824	12/22/2020 4:19:12 PM	
5	No	01-213-104	null		Bin	Pull		1	0.00	Added Bin from	60823	12/22/2020 4:19:12 PM	

- Click on the archive icon.

#	ID	Requisition Status	Requisition #	Release Number	Description	Staging Name	Workorder	Required Date	Number of Items requisitioned	Customer Name	Requisition Type
1	1411	Closed	12/22/2020-1	1	Test			12/22/2020	12		Requisition
2	1410	Closed	12/21/2020-2	1				12/21/2020	11		Requisition

- 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).

#	Expand	Set Billing Action	Billing	Item Number	Pull Order Number	Project Spend Name	Put Away loc	Pull Credit	Pull / Credit Quantity	Extended cost	PullLocation	Actions
2			No	01-213-104	1/13/2021-138		Bin		pull	1	0.00	WHMain
3			No	BRLA80FC	1/13/2021-137	Noy Proj Spend D	Bin		pull	40	1462.40	WHMain

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:

The screenshot shows the 'Workorders' list page. On the left, there are navigation buttons for 'New', 'List' (which is highlighted with a red box), and 'Change Log'. The main area displays a table of work orders with columns: #, Expand, Name, Description, Release Number, Items Used, Total Cost, Status, Created On Date, Tool, and Requisition #. The first two rows are highlighted in dark blue. In the top right corner of the header, there is a printer icon. A context menu is open on the right, listing options: Email (highlighted with a red box), Work Order, Work Order (with a file icon), Work Order (with a trash icon), Excel Export, CSV Export, Bar Code Label, and Download Docs. The 'Email' option is also highlighted with a red box.

- 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.

The screenshot shows the 'Send Report In Email' dialog box. It has fields for 'Send To' (Noy), 'CC', 'Subject' (Work Order), and 'Body' (Attached is the Work Order). There are checkboxes for 'Excel' and 'PDF' (which is checked). At the bottom right, there are 'Cancel' and 'Send Email' buttons, with 'Send Email' highlighted with a red box.



Work Orders > Inbox x eTurns Daily Notifications x

sapphire@eturns.com

to me ▾

Attached is the Work Order



Reply

Forward

- 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.

https://sapphire.eturns.com/Reports/NewReportViewer.aspx?ID=15

Print

1 of 1

Find | Next

6/13/2019 12:35:25 PM

1 of 1

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

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

Workorders

New

List

Change Log

Search

Show 50 Records < 1 >

Go To Page:

Narrow Search By:

#	Expand	ID	Name	Description	Supplier	Release Number	Requisition #	Status
1	⊕	20759	6/12/2019-13 add text		BIO-VWR	1		Open
2	⊕	20757	6/12/2019-11		BIO-VWR	1		Open
3	⊕	20756	6/12/2019-10		Henry Schein	1		Open
4	⊕	20754	6/5/2019-9		Henry Schein	1		Close
5	⊕	20753	WO from WO Page #2		Henry Schein	1		Open

Work_Order_2019...xls



- The Work Order will open as an excel spreadsheet.

	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	A
2	eTurns Powered																							
4																								
5	6/13/2019 12:38:51 PM																							
6																								
10	Description																							
11	Asset																							
12	Tool																							
13	Technician																							
14	Odometer	0																						
15	Requisition #																							
16	Number of Line Items	3																						
17																								
18	ItemNum	ToolName	PullCredi	PullQuant	BinNum	ProjectS	ItemCost	ItemSellP	Avera	Extende	OnHand	Update	Updated	Total										
19	kit		Pull		1 Bin1	Noy	\$0.000	\$0.000	0	\$0.000	8	noy	6/13/20	\$0.000										
20	Test Item		Pull		1 WHMai	Noy	\$0.000	\$0.000	0	\$0.000	9994	noy	6/13/20	\$0.000										

- PDF: Converts the Work Order to a PDF format. Click on the download icon

RPT_c341bc07_9eaf_4721_9ca5_d85190d1678d 1/1

Work Order 1 of 1

6/13/2019 12:44:02 PM

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.

Workorders

Search <input type="text"/>											
	Show 50	Records	< 1 >	Go To Page:							
Narrow Search By:		#	Expand	ID	Name	Description	Supplier	Release Number	Requisition #	Status	
Supplier	Technician	Customer	Asset	Tool	User (Created by)	1	20759	6/12/2019-13 add text	BIO-VWR	1	Open
						2	20757	6/12/2019-11	BIO-VWR	1	Open
						3	20756	6/12/2019-10	Henry Schein	1	Open
						4	20754	6/5/2019-9	Henry Schein	1	Close
						5	20753	WO from WO Page #2	Henry Schein	1	Open

Work_Order_2019....xls

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

Workorders

Search <input type="text"/>											
	Show 50	Records	< 1 >	Go To Page:							
Narrow Search By:		#	Expand	ID	Name	Description	Supplier	Release Number	Requisition #	Status	
Supplier	Technician	Customer	Asset	Tool	User (Created by)	1	20759	6/12/2019-13 add text	BIO-VWR	1	Open
						2	20757	6/12/2019-11	BIO-VWR	1	Open
						3	20756	6/12/2019-10	Henry Schein	1	Open
						4	20754	6/5/2019-9	Henry Schein	1	Close
						5	20753	WO from WO Page #2	Henry Schein	1	Open

WorkOrder_2019....csv

- 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	SupplierN	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.

Labels

Enter number of label copies for each item

Enter number of labels to skip on first sheet

Generate Labels

Name: 6/12/2019-13 add text Customer: Customer 1
Asset: Tool:
ProjectSpend:
UDF1: John Cox UDF2:



Desc:

Name: 6/12/2019-10 Customer:
Asset: Tool:
ProjectSpend:
UDF1: John Cox UDF2:



Desc:

Name: 6/12/2019-11 Customer:
Asset: Tool:
ProjectSpend:
UDF1: John Cox UDF2:



Desc:

Name: 6/5/2019-9 Customer:
Asset: Tool:
ProjectSpend:
UDF1: John Cox UDF2:



Desc:

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

Workorders

Room : NoyStock Rm | Created On Date : 6/12/2019 11:48:08 AM | Created By : noy production

Edit

Name *	6/12/2019-13 add text	Status	Open ▾	Customer				
ReleaseNumber	1							
Asset	▼							
Tool	▼							
Odometer / Operation hours	0.00							
Description								
WorkOrder Files	Choose Files	No file chosen						
<table border="1"><thead><tr><th>File Name</th><th>Delete</th></tr></thead><tbody><tr><td>WorkOrder_20190613.csv</td><td>Delete</td></tr></tbody></table>					File Name	Delete	WorkOrder_20190613.csv	Delete
File Name	Delete							
WorkOrder_20190613.csv	Delete							

List

Change Log



- Click on the downloaded file to open.

Workorders

New List Change Log

Search Show 50 Records < 1 > Go To Page

Narrow Search By:

#	Expand	ID	Name	Description	Supplier	Release Number	Requisition #	Status
1	+ 20759	6/12/2019-13 add text			BIO-VWR	1		Open
2	+ 20757	6/12/2019-11			BIO-VWR	1		Open
3	+ 20756	6/12/2019-10			Henry Schein	1		Open
4	+ 20754	6/5/2019-9			Henry Schein	1		Close
5	+ 20753	WO from WO Page #2			Henry Schein	1		Open

WorkOrder_20190....csv ^

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.

Workorders

New List Change Log

Search Show 25 Records < 1 2 3 4 5 ... 8 > Go To Page: Go

Narrow Search By:

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #	Created By
1	+ 3/4/2021-90				1	0.00	Open	3/4/2021 2:51:53 PM			noysa
2	+ 2/18/2021-8				5	39.58	Close	3/5/2021 10:37:58 AM			noysa
3	+ 3/4/2021-89				0	0.00	Open	3/4/2021 2:42:33 PM			noysa
4	+ 3/4/2021-88	General Work Order			2	1462.40	Open	3/4/2021 1:18:56 PM	MY29-3		noysa

Workorders

New List Change Log

Search Show 10 records < 1 >

Action	Name	Release Number	From Where	Status	Technician	Customer	Asset Name	Tool	Items Used	Total Cost	Description	Room	Created On Date	Updated On Date	Created date	Updated date	Added From	Edited From	Received On Date	Received On W Date
Update	5/28/2019-6	1	Work Order	Open					2	544.25		NoyWarehouse	5/28/2019 1:34:02 PM	5/28/2019 1:35:24 PM	noy production	noy production	Web	Web	5/28/2019 1:34:02 PM	5/28/2019 1:35:24 PM
Update	5/28/2019-6	1	Work Order	Open					2	544.25		NoyWarehouse	5/28/2019 1:34:02 PM	5/28/2019 1:34:24 PM	noy production	noy production	Web	Web	5/28/2019 1:34:02 PM	5/28/2019 1:34:24 PM
Update	5/28/2019-6	1	Work Order	Open					1	499		NoyWarehouse	5/28/2019 1:34:02 PM	5/28/2019 1:34:23 PM	noy production	noy production	Web	Web	5/28/2019 1:34:02 PM	5/28/2019 1:34:23 PM
Insert	5/28/2019-6	1	Work Order	Open					0	0		NoyWarehouse	5/28/2019 1:34:02 PM	5/28/2019 1:34:02 PM	noy production	noy production	Web	Web	5/28/2019 1:34:02 PM	5/28/2019 1:34:02 PM
Update	5/28/2019-6	1	Work Order	Close					2	544.25		NoyWarehouse	5/28/2019 1:34:02 PM	5/28/2019 1:35:34 PM	noy production	noy production	Web	Web	5/28/2019 1:34:02 PM	5/28/2019 1:35:34 PM

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

Workorders

Action	Name	Release Number	From Where	Status	Technician	Customer Name	Asset Name	Tool	Items Used	Total Cost	Description	Room	Created On Date	Updated On Date
Insert	3/4/2021-90	1	Work Order	Open					0	0		NoyStock Rm	3/4/2021 2:51:53 PM	3/4/2021 2:51:53 PM
Update	3/4/2021-90	1	Work Order	Open					1	0		NoyStock Rm	3/4/2021 2:51:53 PM	3/5/2021 11:07:37 AM
Update	3/4/2021-90	1	Work Order	Open					1	0		NoyStock Rm	3/4/2021 2:51:53 PM	3/4/2021 2:52:18 PM

- 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.

Work Order List History

Room : NoyStock Rm | Created On Date : 3/4/2021 2:51:53 PM | Created By : noysa | Updated On Date : 3/4/2021 2:51:53 PM | Updated By : noysa

Name*	3/4/2021-90	ReleaseNumber	1	Status	Open	Customer
Close						

#	Pull Credit	Created Date	Pull / Credit Quantity	Cost	Tool Location	Project Spend Name	ID	History ID	Item Number	Updated Date	Room	Updated By	Created By	Item Type	Added From
1	pull	3/4/2021 2:52:16 PM	1	0	WHMain	Noy Proj Spend D	71064	143957	01-213-104	3/4/2021 2:52:16 PM	NoyStock Rm	noysa	noysa	Item	Web
2	pull	3/4/2021 2:52:16 PM	1	0	WHMain	Noy Proj Spend D	71064	143958	01-213-104	3/4/2021 2:52:16 PM	NoyStock Rm	noysa	noysa	Item	Web

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.

Workorders																	
Search <input type="text"/> Go To Page: <input type="button" value="Go"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="New"/> <input type="button" value="List"/>																	
ID	Name	Status	Technician	Customer	Asset Name	Tool	Created	Updated	Room	Created On	Updated On	UDF1	UDF2	UDF3	UDF4		
13	new Pull Test_Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	4/19/2013 04:36:41 PM	4/20/2013 04:19:31 PM	Room 1	Rock	Rock	adsfadsfa	WO2	GXRConsignment Job 3			
10017	6008	Open					4/23/2013 07:58:16 PM	4/23/2013 07:58:16 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10018	6009	Open					4/23/2013 07:58:27 PM	4/23/2013 07:58:37 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10019	6010	Open					4/23/2013 07:58:45 PM	4/23/2013 07:58:52 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10021	6012	Open		Customer123			4/23/2013 07:59:17 PM	4/23/2013 07:59:17 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10022	6013	Open			Panasonic		4/23/2013 07:59:30 PM	4/23/2013 01:57:56 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10023	6015	Open					4/23/2013 08:00:45 PM	4/23/2013 08:00:54 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10024	6016	Open					4/23/2013 08:00:59 PM	4/24/2013 04:24:34 PM	Room 1	Indi	Indi		WO2	GXRConsignment Job 3			
10025	6012AAAA556	Open	final test for tab	Order Cust#1	First Asset 2332	new check in check out	4/24/2013 11:14:32 AM	4/24/2013 01:29:19 PM	Room 1	Indi	Rock	3333	WO2	GXRConsignment Job 3			
10026	6014	Open	Computer Operator	Order Cust#1			4/24/2013 11:46:48 AM	4/24/2013 01:40:10 PM	Room 1	Indi	Indi		WO1	GXRConsignment Job 3			

1 - 10 of 27

b) Narrow Search

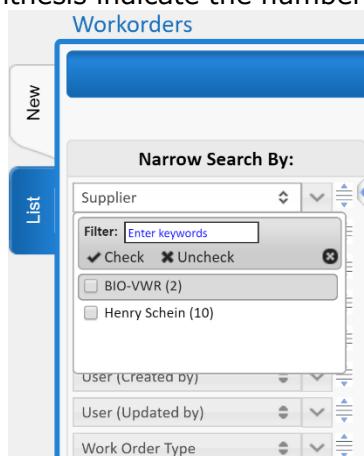
This function is used to filter or narrow down the scope of the search for user convenience. It is an alternate or can be used in conjunction with the (Main) Search function.

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

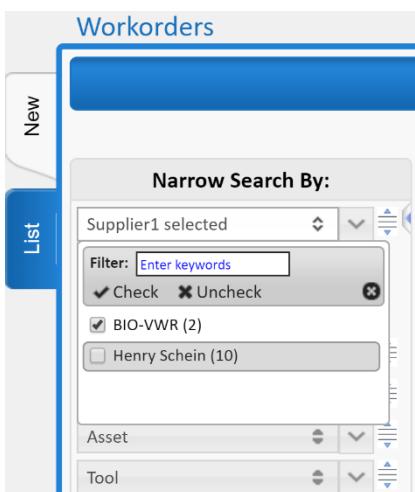
Workorders																	
Search <input type="text"/> Go To Page: <input type="button" value="Go"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="New"/> <input type="button" value="List"/>																	
Narrow Search By: Supplier <input type="button" value="▼"/> <input type="button" value="▲"/> Technician <input type="button" value="▼"/> <input type="button" value="▲"/> Customer <input type="button" value="▼"/> <input type="button" value="▲"/> Asset <input type="button" value="▼"/> <input type="button" value="▲"/> Tool <input type="button" value="▼"/> <input type="button" value="▲"/> User (Created by) <input type="button" value="▼"/> <input type="button" value="▲"/> User (Updated by) <input type="button" value="▼"/> <input type="button" value="▲"/> Work Order Type <input type="button" value="▼"/> <input type="button" value="▲"/> Date Created <input type="button" value="▼"/> <input type="button" value="▲"/> From <input type="text"/> <input type="button" value="▼"/> <input type="button" value="▲"/> To <input type="text"/> <input type="button" value="▼"/> <input type="button" value="▲"/> Date Updated <input type="button" value="▼"/> <input type="button" value="▲"/> From <input type="text"/> <input type="button" value="▼"/> <input type="button" value="▲"/> To <input type="text"/> <input type="button" value="▼"/> <input type="button" value="▲"/> Technician <input type="button" value="▼"/> <input type="button" value="▲"/> <input type="button" value="Clear"/>																	
#	Expand	ID	Name	Description	Supplier	Release Number	Requisition #	Status	Technician	Customer	Asset Name	Tool	Odometer / Operation hours				
1	<input checked="" type="radio"/>	20759	6/12/2019-13 add text		BIO-VWR	1		Open		Customer 1			0				
2	<input checked="" type="radio"/>	20757	6/12/2019-11		BIO-VWR	1		Open					0				
3	<input checked="" type="radio"/>	20756	6/12/2019-10		Henry Schein	1		Open					0				
4	<input checked="" type="radio"/>	20754	6/5/2019-9		Henry Schein	1		Close					0				
5	<input checked="" type="radio"/>	20753	WO from WO Page #2		Henry Schein	1		Open					0				
6	<input checked="" type="radio"/>	20752	WO created in Reg #2			1	6/4/2019-7,6/4/2019-9	Close					0				
7	<input checked="" type="radio"/>	20751	WO Created in WO Page		Henry Schein	1		Open					0				
8	<input checked="" type="radio"/>	20750	WO created thru Reg			1	6/4/2019-6	Open					0				

1 - 22 of 22

- 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. BIO-VWR (2)
- Click Check
- Click Uncheck
- Click to close the Narrow Search filter
- This applies to all Narrow Search functions

Field	Description
Supplier/Technician/ Customer/Asset/ Tool	<p>It is used to filter the module in accordance to the Technician field. Click on up- down arrow key. Dropdown appears:</p> <p>User can select or unselect all the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>
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 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. 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.</p> <p>Dropdown appears:</p> <p>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 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.

#	ID	Name	Description	Supplier	Release Number	Requisition #	Status	Technician	Customer	Asset Name	Tool	Odometer / Operation hours
1	50	20759	6/12/2019-13.add text	BIO-VWR	1		Open		Customer 1			0
2	100	20757	6/12/2019-11	BIO-VWR	1		Open					0
3	500	20756	6/12/2019-10	Henry Schein	1		Open					0
4	1000	20754	6/5/2019-9	Henry Schein	1		Close					0
5	20753	WO from WO Page #2		Henry Schein	1		Open					0
6	20752	WO created in Reg #2			1	6/4/2019-7,6/4/2019-9	Close					0
7	20751	WO Created in WO Page		Henry Schein	1		Open					0
8	20750	WO created			1	6/4/2019-6	Open					0

19. Wheel Settings:

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

#	Expand	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #
1	+	3/4/2021-90		1		1 0.00	Open	3/4/2021 2:51:53 PM		
2	+	2/18/2021-8		1		5 39.58	Close	3/5/2021 10:37:58 AM		
3	+	3/4/2021-89		1		0 0.00	Open	3/4/2021 2:42:33 PM		
4	+	3/4/2021-88	General Work Order	1		2 1462.40	Open	3/4/2021 1:18:56 PM	MY29-3	
5	+	2020-12-21_R5	Monday! Closer on web but	1		30 482.38	Open	12/21/2020 8:18:46 AM		



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.

Work Orders													Actions	
Show	25	Records <	1	2	3	4	>	Go To Page:	Go	Print	Export	Search	Refresh	
#	Expand	Set Billing Action	Billing	Item Number	Pull Order Number	Project Spend Name	Put Away Loc	Pull Credit	Pull / Credit Quantity	Extended Cost	Pull Location	Actions		
1			No	06-666-1A	null		Bin		pull	5	0.00	Noy-WHM	Refresh	<input type="checkbox"/> Auto Refresh
2			No	01-213-104	null		Bin		pull	1	0.00	WHMain	<input checked="" type="checkbox"/> Only Deleted	<input type="checkbox"/> Only Archived

d. Only Archived

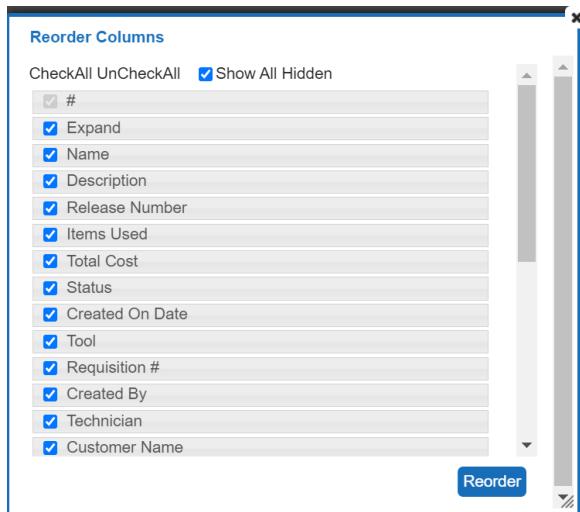
This option displays only the archived Work Order(s). To select, check the box Only Archived.

Only Archived

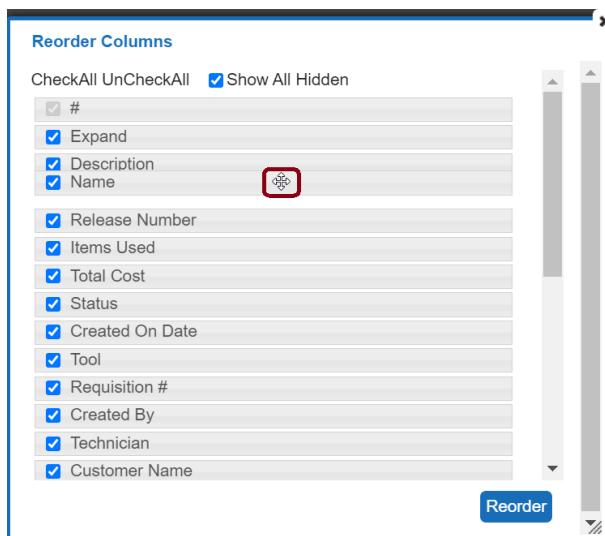
Workorders													Actions				
Search													Actions				
Show	25	Records <	1	>	Go To Page:	Go	Print	Export	Search	Refresh	Auto Refresh	Only Deleted	Only Archived	Reorder	UDF Setup	A A+ A A-	
Narrow Search By:	Supplier	Name	Description	Release Number	Items Used	Total Cost	Status	Created On Date	Tool	Requisition #							
Supplier	Technician	Customer	Asset	Tool	User (Created by)	1	01/28/2019-1	Close	1/29/2019 9:51:41 AM		Refresh	<input type="checkbox"/> Auto Refresh	<input type="checkbox"/> Only Deleted	<input checked="" type="checkbox"/> Only Archived	Reorder	UDF Setup	A A+ A A-

e. Reorder

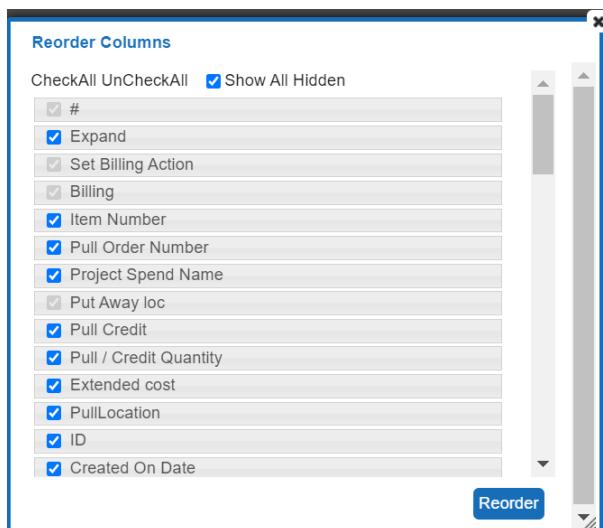
This option enables the user to reorder the columns of the module. Click on the  icon and the reorder columns option will be displayed.



- 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														
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	11/7/2018 6:16:47 AM	11/7/2018 2:29:23 PM	Noy	Noy	<input type="checkbox"/>	200	
1558	UDF2	UDF2	UDF2			<input type="checkbox"/>	<input checked="" type="checkbox"/>	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	<input type="checkbox"/>	200	
1559	UDF3	UDF3	UDF3			<input type="checkbox"/>	<input checked="" type="checkbox"/>	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	<input type="checkbox"/>	200	
1560	UDF4	UDF4	UDF4			<input type="checkbox"/>	<input checked="" type="checkbox"/>	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	<input type="checkbox"/>	200	
1561	UDF5	UDF5	UDF5			<input type="checkbox"/>	<input checked="" type="checkbox"/>	11/7/2018 6:16:47 AM	11/7/2018 6:16:47 AM	Noy	Noy	<input type="checkbox"/>	200	

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

UDF Setting for Workorders

Created On Date : 11/7/2018 6:16:47 AM | Created By : Noy | Up

Is Deleted	<input type="checkbox"/>
UDF1 *	UDF1
PDA UDF *	UDF1
Required	<input type="checkbox"/>
Include in Narrow Search	<input checked="" type="checkbox"/>
Control Type *	Textbox
UDFMaxLength	200
Default Textbox Value	

Save **Cancel**

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

Workorders

New

Name*	3/5/2021-91	Status	Open	Customer	(Add New)
ReleaseNumber	1	Supplier	Henry Schein		
Asset		Drop ship address	Please Select		
Tool		Technician			
Odometer / Operation hours		Project Spend			
Description		UDF1	<input type="checkbox"/>		
WorkOrder Files	Choose Files No file chosen	File Name ▲ Delete			<input checked="" type="checkbox"/> Check the textbox or dropdowns if you want to have the
		No data available in table			

Save **Cancel**

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

UDF Setting for Requisitions

Created On Date : 2/4/2021 12:13:27 PM | Created By : noysa | Updated On Date : 2/4/2021

Is Deleted	<input type="checkbox"/>
UDF1 *	UDF1
PDA UDF *	UDF1
Required	<input type="checkbox"/>
Include in Narrow Search	<input checked="" type="checkbox"/>
Control Type *	Textbox
UDFMaxLength	200
Default Textbox Value	

Save **Cancel**

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