

Custom List Views

Last Modified on 05/12/2022 10:50 am EDT

Overview

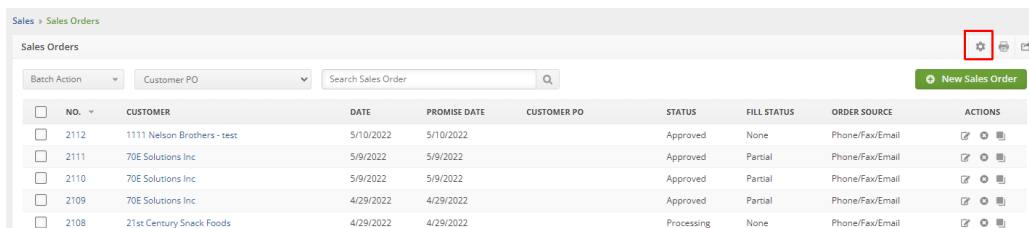
The ability for Order Time users to save custom list columns and filters on record screens for future use and to share or not share with other users.

Solution

Order Time has added a Save As button to the List Options screen to allow users to save custom list columns and filters. This tutorial was created using the Sales Order record screen. However, this feature is available on all Open Full List record screens.

To do this

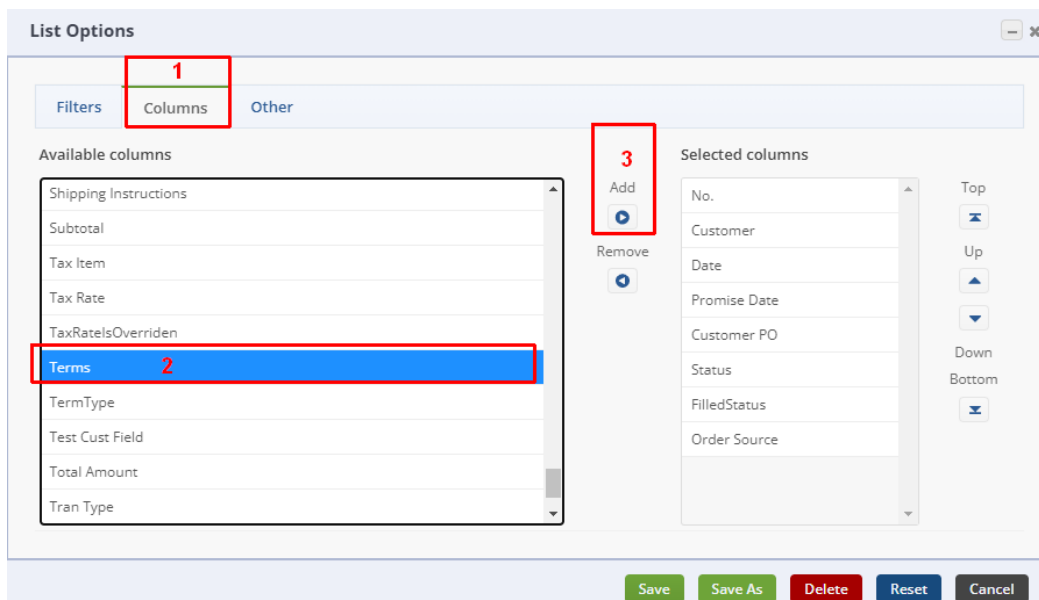
- Go to Open Full List and select Sales Orders
- On the Sales Order screen click the Settings/Gear icon shown in the red square



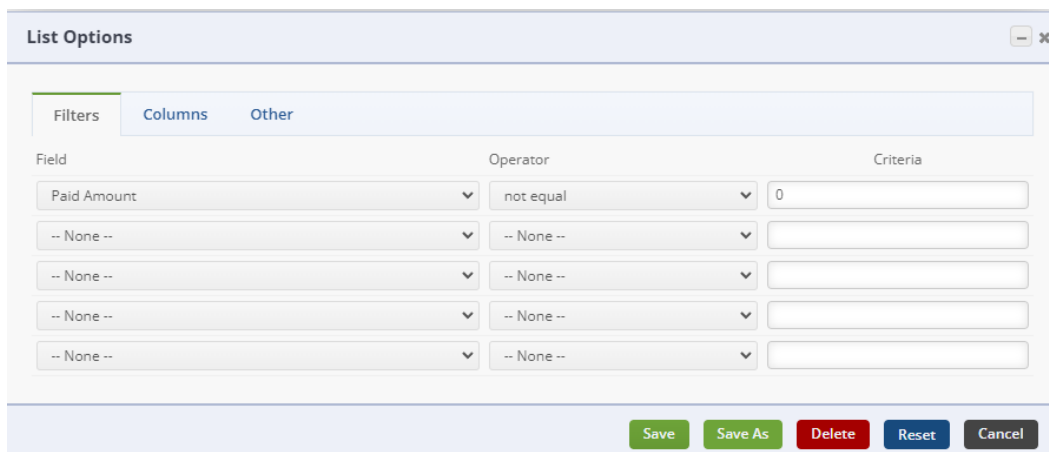
The screenshot shows the 'Sales Orders' record screen. At the top, there is a breadcrumb 'Sales > Sales Orders' and a title 'Sales Orders'. Below the title, there are controls for 'Batch Action', 'Customer PO', and a search box labeled 'Search Sales Order'. A green button labeled 'New Sales Order' is on the right. A table of sales orders is displayed below. The table has columns for 'NO.', 'CUSTOMER', 'DATE', 'PROMISE DATE', 'CUSTOMER PO', 'STATUS', 'FILL STATUS', 'ORDER SOURCE', and 'ACTIONS'. The 'ACTIONS' column contains icons for edit, delete, and print. A red square highlights the settings gear icon in the top right corner of the table area.

NO.	CUSTOMER	DATE	PROMISE DATE	CUSTOMER PO	STATUS	FILL STATUS	ORDER SOURCE	ACTIONS
2112	1111 Nelson Brothers - test	5/10/2022	5/10/2022		Approved	None	Phone/Fax/Email	[edit] [delete] [print]
2111	70E Solutions Inc	5/9/2022	5/9/2022		Approved	Partial	Phone/Fax/Email	[edit] [delete] [print]
2110	70E Solutions Inc	5/9/2022	5/9/2022		Approved	Partial	Phone/Fax/Email	[edit] [delete] [print]
2109	70E Solutions Inc	4/29/2022	4/29/2022		Approved	Partial	Phone/Fax/Email	[edit] [delete] [print]
2108	21st Century Snack Foods	4/29/2022	4/29/2022		Processing	None	Phone/Fax/Email	[edit] [delete] [print]

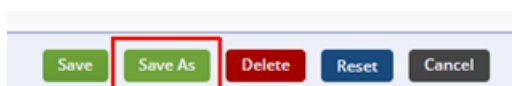
- On the List Options screen
 1. Click Columns
 2. Find and click your selected field, in this example I selected Terms
 3. Click the Add button
 4. To follow my example, repeat steps 1 - 3 to select and add Paid Amount



- Now click the Filters tab and
 1. Select your chosen field to filter the view, in my example I have chosen Paid Amount
 2. Change the Operator to what you need, I am using not equal
 3. Type the Criteria you want to filter by into the Criteria field



- Now you are ready to click Save As at the bottom of the List Options screen



- On the Save List View As screen
 1. Type a name for the List View. For example if the view is for a specific user you could name it similar to Custom Sales Order View – Edward
 2. You can click the checkbox for Creator Only if you want to restrict use of this List View to only the user that created it. If left unchecked all Order Time users will be able to use this List View.

List Options

Filters Columns Other

Save List View As

Name: Custom Sales Order View - Edward

Creator Only

Save Cancel

Save Save As Delete Reset Cancel

Now you have created a custom List View and you can access it by going to Open Full List and Sales Orders. Then click the List View drop down to find and open your custom List View

Sales > Sales Orders

Sales Orders

Batch Action Customer PO Search Sales Order

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SalesOrder-Ian Benoitel

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ORDER SOURCE TERMS

NO.	CUSTOMER	DATE	PROMISE DATE	CUSTOMER PO	STATUS	FILL STATUS	ORDER SOURCE	TERMS	PAID AMOUNT	ACTIONS
2112	1111 Nelson Brothers - test	5/10/2022	5/10/2022		Approved	None	Phone/Fax/Email	2 net 30	-0.00	

New Sales Order

Deleting a custom List View

- If you ever need to delete a custom List View
 1. Select the List View from the drop-down menu
 2. Click the gear icon on the top right
 3. On the List Options window click the Other tab to verify you are deleting the correct List View
 4. Click Delete

Sales > Sales Orders

Sales Orders

Batch Action Customer PO Search Sales Order

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New Sales Order

NO.	CUSTOMER	DATE	PROMISE DATE	CUSTOMER PO	STATUS	FILL STATUS	ORDER SOURCE	TERMS	PAID AMOUNT	ACTIONS
2105	1496 Ontario Inc.	4/27/2022	4/27/2022		Closed	All	Phone/Fax/Email	Net 30	-0.00	

List Options

Filters Columns Other

Records per page: 100

Search by: Customer PO

Name: Custom Sales Order View - Edward

Creator Only

Save Save As Delete Reset Cancel

