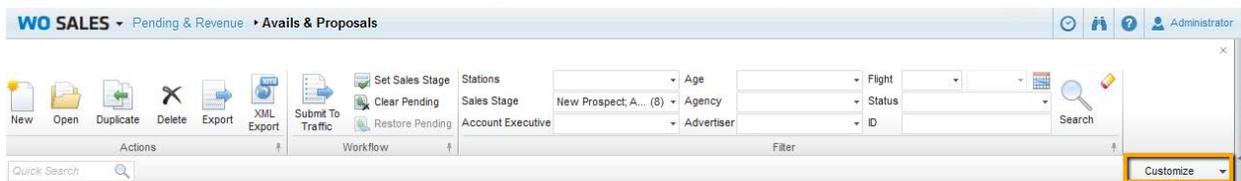


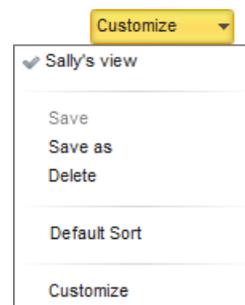
Customize Menu

WO Sales v3.0

- The Customize menu replaces the Manage Views menu starting in WO Sales v3.0.
- Customize can be found on the right side of most screens, below the Ribbon Toolbar.



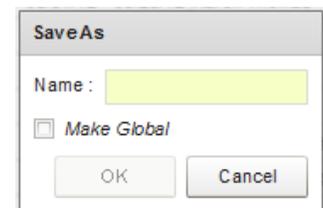
- Click **Customize** to see the menu.
- Most Customize menus have the following options:
 - Saved views
 - Save
 - Save as
 - Delete
 - Default Sort
 - Customize



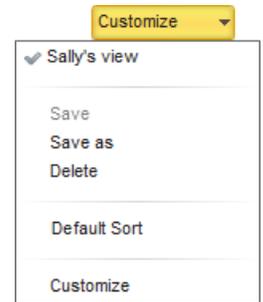
- Note that not all options are available on all screens and some screens, such as the Avail and Proposal workspace, may have additional options.

Saved Views

- Arrange your screen to show data the way you want it:
 - On most screens, you can drag and drop columns to rearrange them.
 - You may also hide or show columns (see the **Customize** section later in this document).
 - Click or shift-click column headers to sort contents in ascending or descending order.
 - Use filter options in the Ribbon Toolbar to narrow the data that displays.
- After arranging your screen, save the view by selecting **Customize > Save As**. This brings up the Save As pop-up box.
- Enter a name for your saved view.
- With proper security rights, you can make your saved view **Global**, so other people at your station can use it.
- Click **OK** to save the view, or **Cancel** to close the Save As box without saving the view.



- Saved views display at the top of the Customize menu list, as with “Sally’s view” in the image to the right:
- The selected view will display a  to the left of the view name.
- If you edit any saved view, such as by rearranging column order or adding and removing columns, then select **Customize > Save** to update the existing view.



Delete

- Select a saved view in the **Customize** menu.
- Click **Delete** to remove that saved view from the system.
- In the confirmation box, click **Yes** to delete the view, or **No** to close the box without deleting.
- Deleted views cannot be recovered, but you may re-use the name in a new saved view.

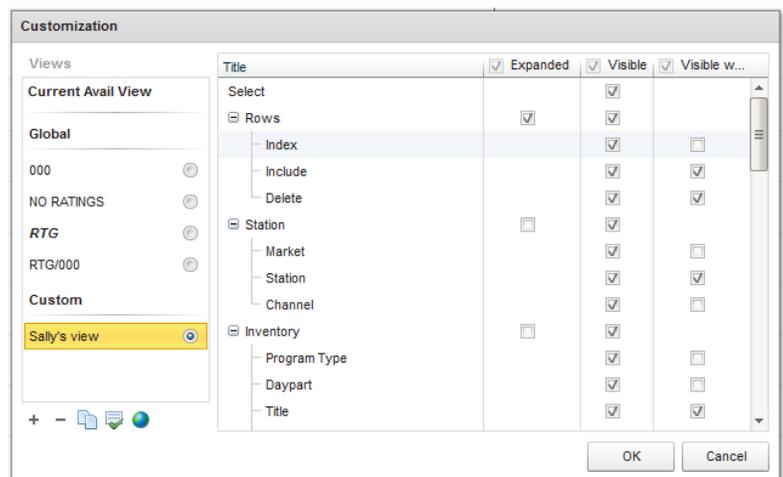
Default Sort

- Select **Default Sort** to restore the view to the WO Sales default sorting.
- You may always re-select a saved view from the **Customize** menu.

Customize

- Select **Customize > Customize** to open the Customization pop-up window.
- Global and Custom saved views display on the left. Click the radio button to the right of a view to select it.
 - Use the view menu options (+ -     ) to create a view, delete, copy, select, make it global, make it local, or set it as the system default.
- Customize columns by selecting which will be visible or not. Check the box in the following sections (use the top-level checkboxes to apply changes to all columns/column blocks):

- **Expanded** – check the box to make the column block fully expanded, with all sub-columns showing.
- **Visible** – check the box to make the column display on your screen. Deselect the box to hide the column.
- **Visible when collapsed** – check this box to make the sub-column remain visible, even if the column block is collapsed.



- Click **OK** to save the column selections. Changes will be applied immediately to your view.
- Click **Cancel** to close the pop-up without saving changes.