

WO Sales v2.1

WideOrbit *WO Sales* Training Guide



Managing Views

Managing Screen Views

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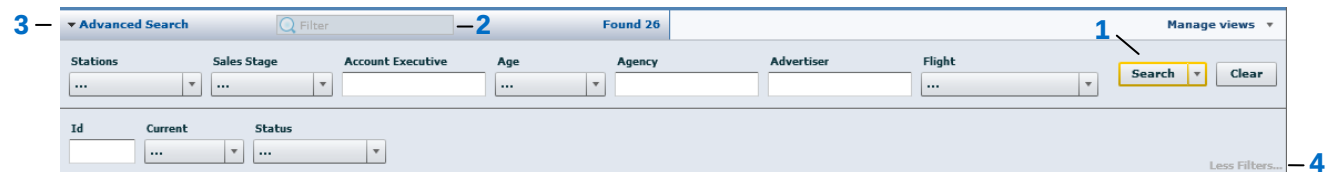
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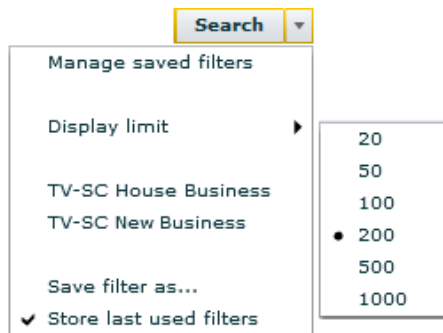
Managing Screen Views

The WO Sales system offers many options for customizing screen views. This document will cover the steps needed to adjust screen views throughout the application.

Search Screens



1. Clicking the Search button on any search screen produces a list of records for that area.



There are several Search button management options available. Click the arrow on the Search button to access the menu.

- The number of records displayed in the Search results list can be set by selecting a number from the **Display Limit** option.
- Select specific filters and save the configuration by selecting **Save Filter as..** and naming the configuration.
Note: Saved configurations will be seen on the menu, simply select any one to utilize those filters.
- Choose to **Store last used filters** and the system will retain filter selections.

2. The Search text field provides a smart search in a results list against any words containing input letters.
3. Filters can be used to limit search results. On search screens, Filters can be expanded or collapsed for more screen real estate by clicking **Advanced Search** or the arrow next to it.

Note: Clicking the Clear button deletes any selections made in Filters.

4. Several screens have secondary filters that can be seen by clicking **More Filters** to access and by clicking **Less Filters** to collapse.

Altering Columns

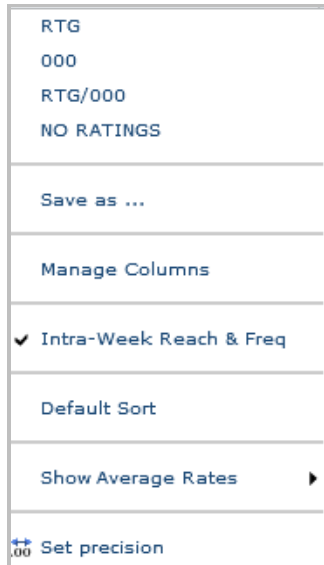
Throughout the application information is displayed in columns. You can affect columns in several ways to customize your screen view.

- Change column width by clicking the double arrow and dragging to the desired size. ⇄
- Rearrange columns by dragging and dropping.
- Sort information by clicking in a column header. Click once to sort in ascending order and twice for descending.
 - From an Avail or Proposal tab, restore the system default sort by selecting the **Default Sort** option from the Manage Views menu. The Ratings Management search screen and open Rating Books can be returned to a default sort by selecting **Reset Sort** from the Manage Views menu. And the Pricing Worksheet inside an open Rate Card can be set to default sort by clicking the **Reset Sorting** button.
- To expand + or collapse - a column directly on the workspace, click the icon at the top of the column. To remove a column or sub-column, hover your mouse over the area and click the ✕.

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Manage Views Menu

The Manage Views menu offers several options. This document will focus on the Manage Views menu found in Avails and Proposals. Although in each area of the application that contains a Manage Views menu functionality is consistent.



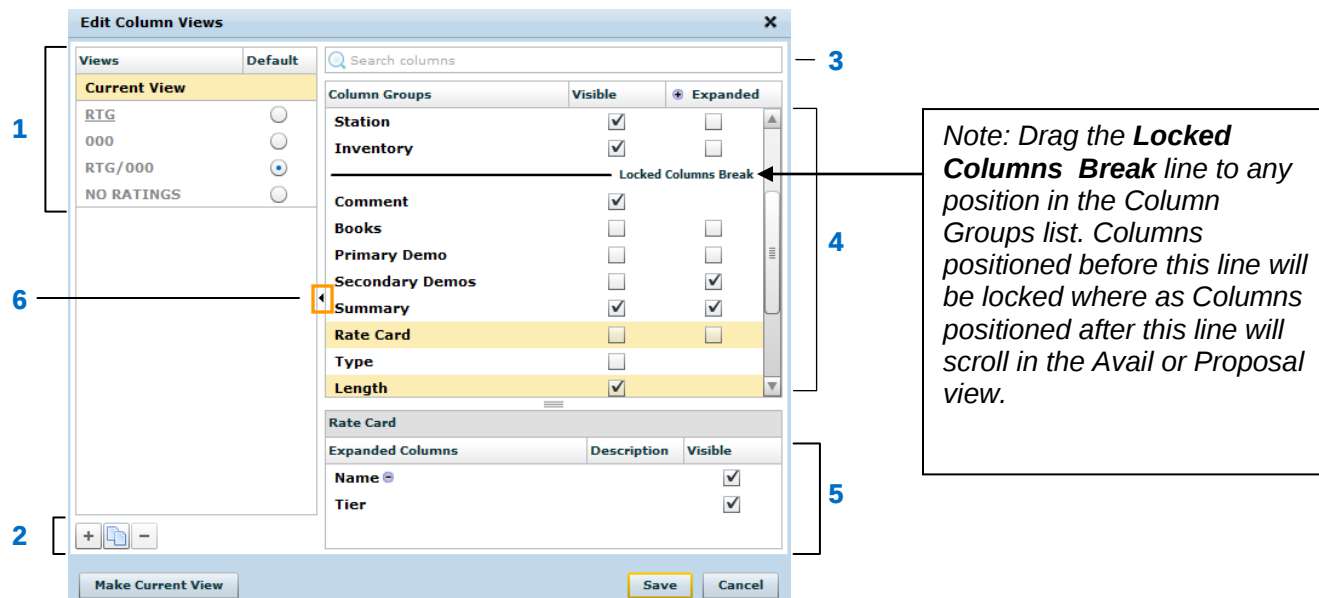
- **Custom views** - The top portion of the drop down menu, lists any Custom views including system default views and user created custom views.
 - Selecting a Custom view from the list will adjust the current screen view with the selected layout's settings.
- **Save as** - Quickly saves column arrangement and allows you to enter a Configuration name and set it as your own default.
- **Manage Columns** - Accesses the Edit Column Views window, where views can be created, customized and saved.
- **Default Sort** - Select this option to reset all of the columns to the system default sort.

- **Set Precision** - Selecting this option will open the **Demo Precision** pop-up menu. From the menu you may choose to adjust the decimal precision on the workspace.



Manage Columns

From the Manage Views menu click Manage Columns to open the Edit Column Views window. The options provided here allow you to adjust the columns visible in your screen view.



1. **Views** - The Views panel on the left displays Current View and any saved custom views.
 - Selecting a view on the left, by highlighting it, displays the included Column Groups for that view in the right panel.
 - The default view is indicated by the radio button on the left. To change the Default, select the radio button next to the appropriate view, and then **Save** or **X** to exit the window.
2. **Configuration Options** - Add , Copy  or Remove  custom views.
3. **Search** - The search field allows you to quickly find a Column header as opposed to scrolling through the list.
4. **Column Groups** - Select or deselect columns via the boxes under **Visible**.
5. **Expanded Columns** - Several Column Groups have an additional checkbox under **Expanded**.
 - Checkmark an Expanded box and additional columns display in the lower portion of the right panel.
 - Expanded column selections display as sub-columns on the workspace.
6. **Expand/Collapse** – the left panel can be expanded or collapsed from the view by clicking the arrow.

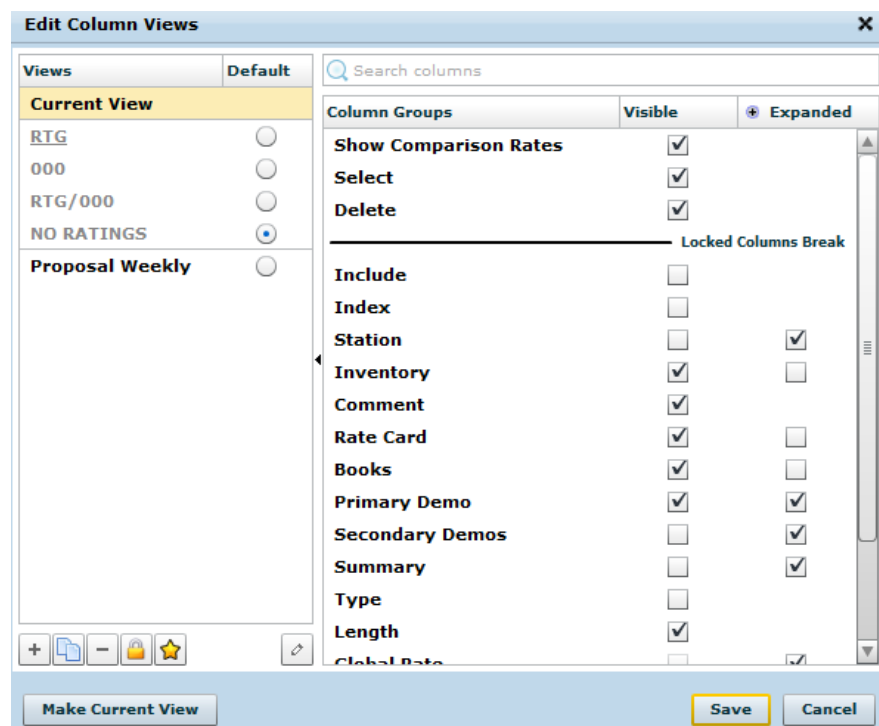
Editing the Current View

- To quickly change the view of your Workspace, select or deselect Column Groups and Expanded Columns checkboxes in the right panel. Then click the **Save** button to Save your changes.
- To change the screen you are working in to a saved Custom View, select a View in the left panel and click **Make Current View** button on the bottom left-hand side. Then click **Save**.

*Note: Custom Views can also be quickly accessed at the top of **Manage Views** menu.*

Creating Custom Views

The options discussed in this portion allow you to create, customize and save screen views. Once saved, these views can be accessed from the top of the Manage Views menu which provides a fast way to view preferred screen configurations.



Note: Custom Views for Avails and Proposals saved in the Add Inventory, Avail and Proposal tabs will be exclusive to the tab they were saved on.

Creating a Custom View

- To create a custom view, select the plus sign icon on the bottom left of the screen.
- Name the new view, then click **Add**. The view will appear at the bottom of the **Views** list and display in bold.
- Check the **Column Groups** and **Expanded Columns** you want to include in the new view.
- Use the **Make Current View** button to see a glimpse of your changes in the background.
- To make this the Default view, select the radio button to the right of your new view.
- Click the **Save** button to save changes when done.

Note: Buttons for the functions Make Global (Earth), Make Local (Lock), System Default (Star) and Edit (Pencil) are security controlled. An administrator at your stations will have access to these functions.

Managing Custom Views

- To edit the name of a view you've created, double click on the name to open the field for editing.
- To **Duplicate** a view click the  button. Name the new view and click **Duplicate**. Then add or remove Columns and **Save** your changes.
- To **Delete** a saved view that you created, highlight it on the list on the left, click the  button then **Save** your changes.

Note: Custom Views on top left in grey are pre-formatted views that cannot be altered. If you wish to make adjustments to a system Custom View, you must duplicate it and save it as a new custom view.