

List Screens in 5.0

Lists used to be search forms - a page of empty boxes you filled in and submitted before seeing anything. In 5.0 a list opens with your data already on screen, and you narrow it down with the filter searchbar.



WHO THIS IS FOR

Anyone who uses list and search screens
day to day

WHAT CHANGED

How you search, and where row links went

CARDS

8

From Search Form to Live Table

The list is already there. Your job is to narrow it down.

BEFORE

Fill in a search form, then press Submit before seeing records.

IN THE NEW LIST

Records appear on load. The filter searchbar sits directly above them.

Read the chips before you start. A list can open with filters already applied.

CETEC ERP

Sales

Parts

Purchasing

Warehouse

Accounting

Production

Admin

Q

F

+

U

Quotes

Create

...

Q	View By is Quote	Status is Open & Pending ×	Intercompany is No ×	Filter or search...	/	×
☐	Quote ID	Name	Owner	Customer	Cust#	First Q
☐	190		CT techx (Cetec ERP Support Team)	HBTEST-1023-B3-Acme Industries	27	No
☐	180		CT techx (Cetec ERP Support Team)	HBTEST-1023-B3-Acme Industries	27	No
☐	172		CT techx (Cetec ERP Support Team)			No
☐	153	HBTEST-1022-B1-REV	CT techx (Cetec ERP Support Team)	Edge Products	2	No
☐	152	HBTEST-1022-B1-LINES	CT techx (Cetec ERP Support Team)	Edge Products	2	No
☐	142		CT techx (Cetec ERP Support Team)			No
☐	139	HBTEST-1022-W3-Q1	CT techx (Cetec ERP Support Team)	Edge Products	2	No
☐	134		CT techx (Cetec ERP Support Team)	HBTEST-1021-SETUP-Cust	21	No
☐	133		CT techx (Cetec ERP Support Team)	HBTEST-1021-SETUP-Cust	21	No
☐	131	HBTEST-1021-CMPL-PO	CT techx (Cetec ERP Support Team)	HBTEST-1021-CMPL-CUST	17	No
☐	130		CT techx (Cetec ERP Support Team)	HBTEST-1021-LEAD-ACME	18	No
☐	126		M mindv	Edge Products	2	No
Rows per page: 25 Showing 1-25 of 53 Export						
< 1 2 3 >						

Quotes opens with View By is Quote, Status is Open & Pending, and Intercompany is No.

KEY MESSAGE

Data first, then narrow it down. Check the starting filters before assuming a record is missing.

Where the Search Boxes Went

Choose a field and its value in the bar above the table.

1 OPEN THE FIELD MENU

Click **Filter or search....** Type a field name to narrow the suggestions, then choose it.

2 SET THE VALUE

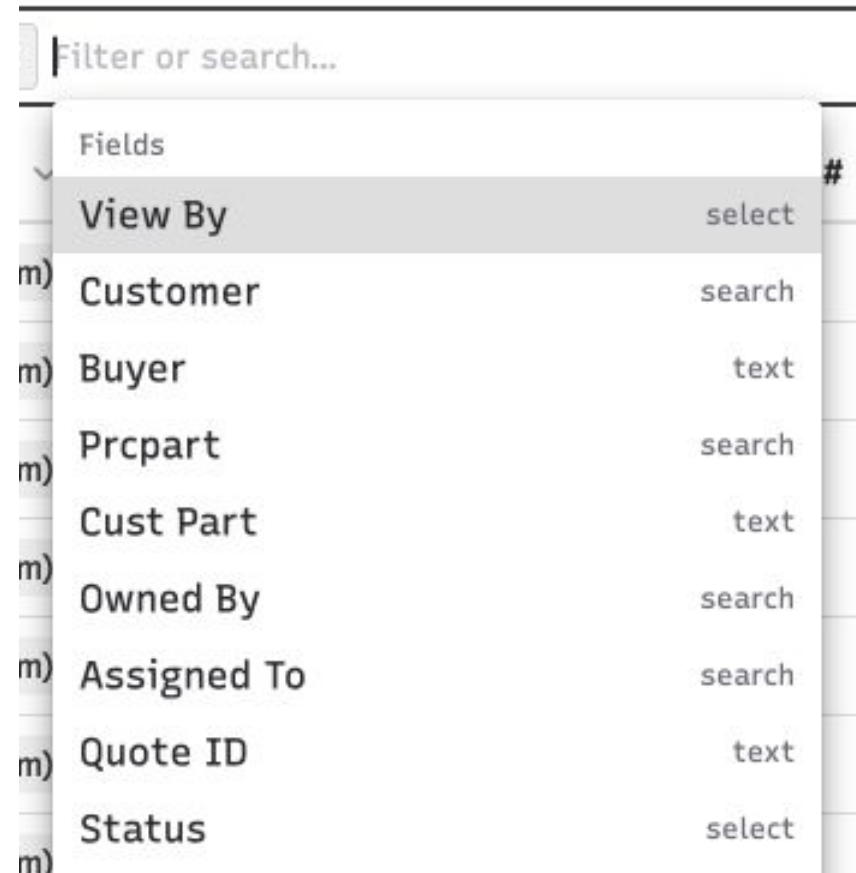
For a select field such as Status, pick an option. For a search field such as Customer, search and choose the matching record. For text, type the value and press **Enter**.

3 APPLY YOUR CHANGES

Add or edit the filters you need, then click **Apply**. The number on the button shows pending changes.

DATES HAVE THEIR OWN CHOICES

Choose a date field such as **Creation Date**. Pick a preset such as Last month, choose a date or range, or enter the displayed YYYY-MM-DD range format. Then Apply.



The menu identifies fields as select, search, text, or date. Scroll for more fields.

KEY MESSAGE

Choose the field first, set its value, then Apply. There is no separate Filters side panel.

Read the Chips. Watch for Pending Changes.

A visible chip can be a draft change until you click Apply.

 These results do not include 1 pending change. Click Apply to update them, or Discard to undo.

☐	Quote ID 	Name 	Owner 	Customer 	Cust# 	First Q 
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DRAFT: the pending-change banner says the rows still reflect the last applied filters.

ADD OR CHANGE A VALUE

Click a chip's value to edit it. Choose the new value, then click **Apply**. Use **Discard** to cancel pending edits and keep the current results.

REMOVE OR CLEAR

Click a chip's **×** to remove that filter. In the tested Quote list, removing an applied chip refreshes results immediately. **Clear all filters** stages changes: check the chips, then Apply or Discard.

WHEN RECORDS LOOK MISSING

Read every chip, including any hidden behind **+ more**. The starting Status is **Open & Pending**. To include closed quotes, click that value, choose **Open, Closed, & Pending (All)**, then Apply.

In this example, that status change increased the count from 53 to 149. Your counts will vary.

KEY MESSAGE

Pending banner visible? Apply or Discard first. Hidden chips still matter: open + more to inspect them.

Choose Your Own Columns

Make a wide table easier to work with.

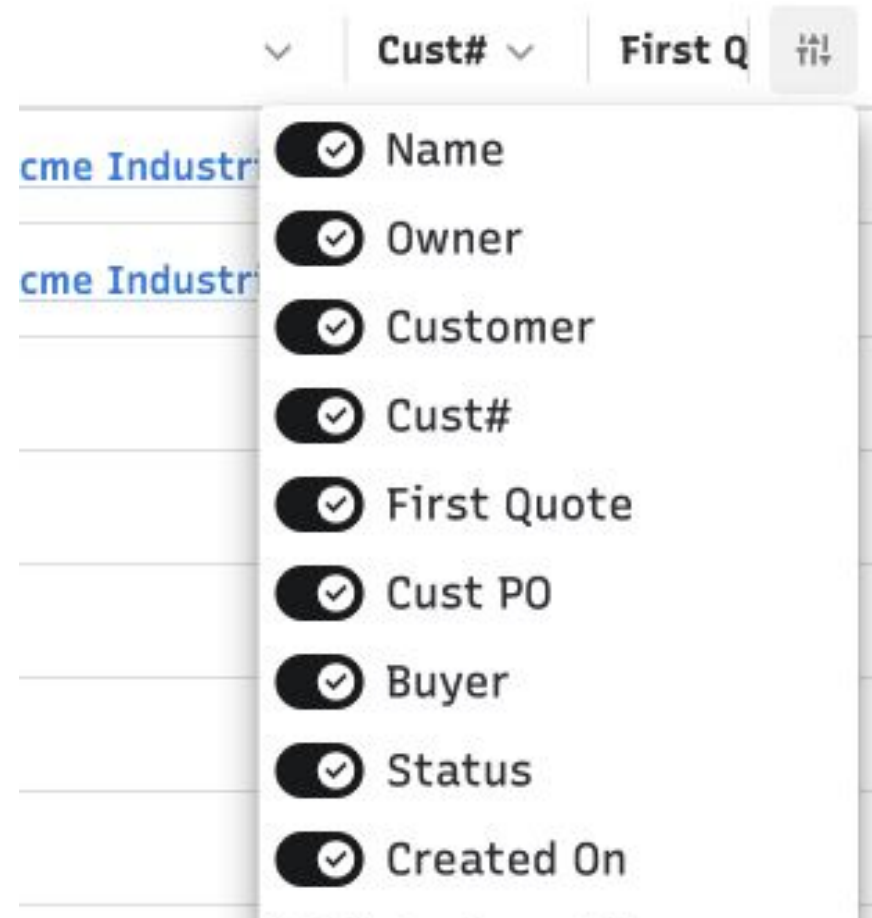
Open the small **Edit columns** icon at the right end of the headings. Each switch shows or hides one column.

Turn off columns you do not use, or turn on extra fields when you need more detail. Quotes has many choices, including addresses, dates, and financial columns.

You can also drag column headings to reorder them. The list remembers your column layout for next time.

COLUMNS AND FILTERS DO DIFFERENT JOBS

Hiding a column changes what you see. A filter changes which records are included.



KEY MESSAGE

Set up the columns for your work. Use filters to narrow the records.

Row Links Became Row Actions

If you are hunting for an old row link, look at the far right.

BEFORE

Actions appeared as separate blue links in the row: Pay, Pick, Put Away, Clock Out, and Stop.

IN 5.0

On lists with row actions, hover over a row and look at its far right. Some actions have new names: Work Start Date becomes Edit Schedule; Prod Stats becomes Update Status.

EXAMPLE: RECEIPTS PENDING PUT AWAY

Put Away Qty	Put Away	Primary Bin ▾	Receipt	⌵
12	1		Put Away	

The numbered Put Away column is data. The Put Away action at the far right is the control that performs the work.

KEY MESSAGE

Missing an old row link? Hover over the row and look at the far right.

Tick Boxes and Bulk Actions

On lists that support selection, act on several records at once.

Quotes

Close Selected ...

	View By is Quote	Status is Open & Pending ×	Intercompany is No ×	Filter or search...	/	×
	Quote ID	Name	Owner	Customer	Cust#	First Q
☒	190		CT techx (Cetec ERP Support Team)	HBTEST-1023-B3-Acme Industries	27	No
☐	180		CT techx (Cetec ERP Support Team)	HBTEST-1023-B3-Acme Industries	27	No

One quote selected: Close Selected appears at the top right.

1 SELECT THE RECORDS

Tick a row's checkbox. The checkbox in the heading selects the rows on the current page. Check the selection count at the bottom.

2 USE THE BULK ACTION

Look at the top right for the available action. In Quotes, it changes from Create to **Close Selected**. If a list has no checkboxes, it has no row-selection bulk action.

Selection is separate from filtering. The Export link may read Export all rows even when a row is selected.

KEY MESSAGE

Tick rows first, then use the bulk-action button. Check the selected count before acting.

Sorting, Totals, Export and Page Size

Finish your filters before you export or share a view.

☐	Quote ID 	Name	Owner
☐	Quote ID		CT techx (Cetec E
☐	Sort A → Z		CT techx (Cetec E
☐	Sort Z → A		CT techx (Cetec E
☐	Filter by Quote ID...		CT techx (Cetec E
☐	153	HBTEST-1022-B1-REV	CT techx (Cetec E
☐	152	HBTEST-1022-B1-LINES	CT techx (Cetec E

SORT FROM A COLUMN MENU

Click a column heading to open its menu. Choose **Sort A to Z** or **Sort Z to A**. Where offered, **Filter by...** opens that field in the searchbar.

TOTALS AND TOOLTIPS

Lists that support totals show a totals row beneath the data. Hover over headings with a dotted underline for an explanation.

EXPORT, PAGE SIZE, AND SHARING

Export: apply pending filters first, then use the link at the bottom of the table. Export follows the applied view; selecting a few rows does not mean only those rows will export.

Rows per page: use the bottom-left control to change page size, including All when available. The result count and page controls are beside it.

Share a filtered view: after Apply, copy the web address. The recipient needs access to the same system.

KEY MESSAGE

Apply your filters, check the result count, then export or copy the address.

Quick Reference

Keep this card beside the screen while you learn the new bar.

See records	Open the list; data appears automatically.
Add a filter	Click Filter or search, pick a field, then set its value.
Find a field quickly	Type its name in the bar and choose the matching field.
Change a filter	Click the chip value, choose or enter a replacement, then Apply.
Use a date range	Choose a date field, then a preset or custom date/range; Apply.
Apply or undo drafts	Apply updates results. Discard cancels pending edits.
Inspect hidden filters	Open + more to see chips that do not fit in the bar.
Remove one filter	Click its ×; an applied chip removal refreshes immediately.
Clear several filters	Use Clear all filters, inspect pending changes, then Apply.
Sort / filter a column	Open the column menu and choose Sort or Filter by... where offered.
Show / reorder columns	Use Edit columns; drag headings to reorder.
Find row / bulk actions	Hover a row for actions; tick checkboxes for bulk actions.
Export / share	Apply first. Use Export or copy the resulting web address.

Examples: current Quote list. Row-action example retained from the original Receipts Pending Put Away guide. Other lists may offer different fields and actions.

KEY MESSAGE

Choose a field, set a value, Apply. Read the chips and pending banner whenever the results surprise you.