

Working with Lists!

Multiple Operations-based lists include similar functions to help you familiarize yourself with the new version of each page. Learn more about list functionality and more by visiting each page's corresponding overview article.






Inventory + CREATE

COUNTS TEMPLATES

Search Table Views Filter Columns Export Refresh

<input type="checkbox"/>	Status ↓	Location ↑	Date ↓	Frequency	Total	Template	Completed By
<input type="checkbox"/>	Completed	Smart Burgers	02/03/2021	Weekly	\$573.08	Weekly Meat Count	R365 User
<input type="checkbox"/>	Approved	Smart Burgers	01/27/2021	Weekly	\$735.40	Weekly Meat Count	R365 User

1 - 2 of 2 Items

- Search the List** – Look for an exact word or number by entering it into the Search Bar.
- Sort Columns** – Reorganize columns in ascending or descending order by clicking the column name. Stack column sorts by holding down 'Shift' and clicking on the additional column header.
- Custom Table Views** – Create a unique Saved Table View to bring forward the most relevant transactions and transaction details 
- Filter the Listing** – Take your Saved Table View to the next level by using this advanced filter feature 
- Display Columns** – Select only the most important columns to populate the listing 
- Export to Excel** – Want to save a copy? Export any listing to Excel 
- Refresh the List** – Save time by refreshing the list and not the window 

Learn more about the Smart Ops Release here!



* bit.ly/smart-ops