

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 from there.



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 single biggest change, and the one that surprises people most.

BEFORE

The screen opened as a **form**. Rows of empty boxes, no data anywhere, and nothing happened until you pressed Submit.

AR Payments

Show Deposits

Payment ID

Date Entered

(From) - (To)

Status

Open

Customer

Search customers...

Payment Type

All

Payment Ref

Post Date

(From) - (To)

Deposit

(Deposit number)

Location

Search Locations

Subsidiary Location

All

Amount

(From) - (To)

Preferred

Use Old Version

Submit

Create

AR Payments before – an empty search form

AFTER

The screen opens with **your records already listed**. No Submit button, nothing to fill in first.

AR Payments

Export

Showing 1-5 of 5

Create

Open Deposits (7)

Status

Subsidiary Location

Filters

ID	Customer	Location	Payment Type	Payment Ref	Entered On	Post Date	Amount	Discounts	Deposit	Active	Description
2	Edge Products	MN	Check (non-system)		3/31/2026	3/31/2026	\$10,000.00	\$0.00	2	Open	Prepayment For Testing Day Quote - REV2 ; Customer PO: TD...
3	Edge Products	MN	Check (non-system)		3/31/2026	3/31/2026	\$0,000.00	\$0.00	3	Open	Prepayment For Testing Day Quote - REV5 ; Customer PO: TD...
5	Edge Products		ACH		3/31/2026	3/31/2026	\$150.50	\$0.00	1	Open	
14	Battle Bus Industries		N/A		6/7/2026	6/7/2026	\$100,000,000.00	\$0.00	1	Open	
15	Battle Bus Industries		ACH		6/15/2026	6/15/2026	\$1,000,000.00	\$0.00	1	Open	
Totals							\$101,010,150.50	\$0.00			

AR Payments after – data on load, with totals

The same thing happened to the **Quote list**, **Receipts Pending Put Away**, and every other converted screen. Different data, identical change.

KEY MESSAGE

You no longer search first and look second. The list is already there – you narrow it down.

Where the Search Boxes Went

Every field from the old form is still available – in a panel that slides out from the right.

Click **Filters** at the top right and the panel opens with the same fields you used to see on the form.

Fill in what you need, then press **Apply**. The list behind the panel updates.

The important difference: your data stays visible while you filter. You are refining a list you can already see, not filling in a form and hoping.

On the Quote screen this matters more than most – the old More Options section that hid half the fields is gone. Everything is in the one panel.

Payment ID

Date Entered From

Date Entered To

Status

Customer

Payment Type

Payment Ref

Post Date From

Post Date To

Apply ?

The Filters panel – the old form fields, on demand

KEY MESSAGE

Old form fields are not gone. They live behind the

FILTERS

button.

Filter Chips Show What You Searched

The most common support call after a rollout: “my records have disappeared.” This card is the answer.

Screens open with sensible filters already applied. On the Quote list that means Quote, open_and_pending and 0 – each shown as a chip. Watch what happens to the record count when one is removed.

STEP 1 — THREE FILTERS ON, 59 QUOTES

Showing 1-25 of 59									
Quote open_and_pending 0 Filters									
☐	Quote ID	Name	Owner	Customer	Cust#	First Quote	Cust PO	Buyer	Status
☐	100036		techx (Cetec ERP Support Team)			No			Open
☐	100035		techx (Cetec ERP Support Team)	Edge Products	2	No			Open

Three chips active. Showing 1-25 of 59.

STEP 2 — CLICK X ON THE STATUS CHIP

Showing 1-25 of 127									
Quote 0 Filters									
☐	Quote ID	Name	Owner	Customer	Cust#	First Quote	Cust PO	Buyer	Status
☐	100037		techx (Cetec ERP Support Team)	Battle Bus Industries	4	No			Closed
☐	100036		techx (Cetec ERP Support Team)			No			Open

One chip removed. Now 1-25 of 127 – and Closed quotes appear.

WHAT JUST HAPPENED

Removing one chip took the list from **59 records to 127**, and quotes marked Closed appeared for the first time.

Those 68 extra quotes were never missing. A filter was simply hiding them.

WHAT TO TEACH

If someone says records are missing, have them **read the chips first**. That answers it nearly every time.

Click the **x** on a chip to drop that filter. The list reloads immediately – no Submit.

In the old screen there was no equivalent. You had to scroll back to the form and read every box to work out what was applied.

KEY MESSAGE

Records look missing? Read the chips. A filter is hiding them – click **x** to clear it.

Choose Your Own Columns

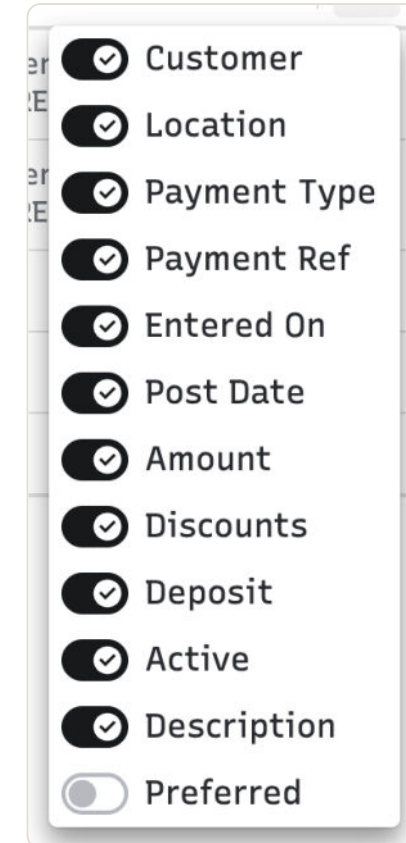
New in 5.0, and it remembers your choice.

The small icon at the right end of the column headings opens a list of every available column, each with a switch.

Switch columns off to simplify the screen, or on to see data that was not shown by default.

This matters most on wide screens like Quotes, which offers over thirty columns – addresses, margins, workflow dates. Switch off what your team never uses.

You can also **drag column headings** to reorder them. Your layout is saved for next time.



The column picker – switch columns on and off

KEY MESSAGE

Set the columns up the way you want once. The screen remembers.

Row Links Became Row Actions

If you are hunting for a button that used to be in the row, this is the card.

BEFORE

Actions sat inside the row as blue links – Pay, Pick, Put Away, Clock Out, Stop.
Every one was a separate column, which made rows wide and cluttered.

AFTER

Those actions moved to the end of the row, appearing when you hover over it.

Pay	→ row action
Pick	→ row action
Put Away	→ row action
Clock Out	→ row action
Work Start Date	→ Edit Schedule
Prod Stats	→ Update Status

SEEN ON RECEIPTS PENDING PUT AWAY

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

Hover a row and the Put Away action appears at the end of it

Watch out for one thing here: **“Put Away” appears twice**. The middle one is a data column showing a number; the one at the far right, which appears when you hover, is the button that actually does the work.

KEY MESSAGE

Missing a link from the row? Hover over the row and look at the far right.

Tick Boxes and Bulk Actions

On lists that support it, you can now act on many records at once.

Quotes

Export

3 of 25 selected

View By

Status

Intercompany

Filters

Quote X

open_and_pending X

0 X

Close Selected

...

☐	Quote ID	Name	Owner	Customer	Cust#	First Quote	Cust PO	Buyer	Status	Created On	Assigned To
☒	100036		TT techx (Cetec ERP Support Team)			No			Open	7/16/2026	TT techx (Cetec ER
☒	100035		TT techx (Cetec ERP Support Team)	Edge Products	2	No			Open	7/16/2026	TT techx (Cetec ER

Three quotes selected – the action bar changes to Close Selected

BEFORE

The Quote list had a Close Selected control sitting permanently at the bottom of the search form, whether or not anything was selected.

AFTER

Tick the box on any row. A count appears – 3 of 25 selected – and the button at the top right changes to the bulk action.

The box in the heading row selects everything on the page at once.

Not every list has selection. If there are no tick boxes, that list has no bulk actions.

KEY MESSAGE

Tick rows first, then look to the top right – the bulk action button appears once something is selected.

Sorting, Totals, Export and Page Size

Smaller changes that come with every converted list.

Export

Showing 1–5 of 5

StatusSubsidiaryLocation

1 X-1 XFilters

ID	Customer	Location	Payment Type	Payment Ref	Entered On	Post Date	Amount	Discounts	Deposit	Active	Description
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2	Edge Products	MN	Check (non-system)		3/31/2026	3/31/2026	\$10,000.00	\$0.00	2	Open	Prepayment For Testing Day Quote - REV2 ; Customer PO: TD...
3	Edge Products	MN	Check (non-system)		3/31/2026	3/31/2026	\$9,000.00	\$0.00	3	Open	Prepayment For Testing Day Quote - REV5 ; Customer PO: TD...
5	Edge Products		ACH		3/31/2026	3/31/2026	\$150.50	\$0.00	1	Open	
Totals							\$101,019,150.50	\$0.00			

Sorted by Amount – note Export, the result count, and the Totals row

WHAT IS NEW

- **Sorting** – click a column heading to sort by it
- **Totals row** – money columns total at the bottom
- **Export** – downloads exactly what you are looking at
- **Page size** – choose rows per page, including All
- **Result count** – “Showing 1–25 of 69” above the table

WORTH KNOWING

Export follows your filters. If a filter is on, the export contains the filtered rows only – not the whole table. Check your chips before exporting.

Headings with a dotted underline have a tooltip. Hover for an explanation of that column.

Your link is shareable. Filters are stored in the web address, so sending the URL to a colleague shows them the same filtered list.

KEY MESSAGE

Export gives you what is on screen. Filter first, then export.

Quick Reference

The card to keep next to the screen for the first week.

Where everything went on a converted list screen.

WHAT YOU WANT	BEFORE	IN 5.0
See your records	Fill the form, press Submit	Already on screen when it opens
Search / narrow down	Boxes on the page	Filters button, then Apply
Extra search fields	Hidden under More Options	All in the Filters panel
See what you filtered on	Scroll back to the form	Chips above the table
Clear one filter	Empty the box, resubmit	Click × on its chip
Sort	Rarely available	Click the column heading
Show / hide columns	Not available	Icon at the end of the headings
Reorder columns	Not available	Drag the column heading
Row actions (Pay, Put Away...)	Blue link in the row	Hover the row, look far right
Act on many records	Control under the form	Tick boxes, then the top-right button
Export	Whole table	Matches your current filters and sort
Totals	Often absent	Totals row under the table
Rows per page	Fixed	Choose, including All
Share a filtered view	Describe it in words	Copy the web address

KEY MESSAGE

Data first, then narrow it down. That one habit covers almost everything on this card.