



Quick Load Grids

Megan De Freitas - 2024-11-22 - Setup

Note: This functionality has been removed and been replaced by the Load Visible Columns Security as of version 4.6.2.0 of SalesPad Desktop.

Overview

Quick Load Grids have been placed on key screens where loading large amounts of data may be slow: Customer Overview - Open Sales Document, Customer Contact Addresses, and Sales Fulfillment Plugin - Serial Tracked Items. Instead of loading all the data, these grids will load the top 201 records, then load more records as the user scrolls through the grid.

Note: User Defined Fields are not currently supported on these grids.

Usage

To access additional functionalities besides that found in the orange triangle dropdown in the upper left-hand corner, simply right-click on the columns.

Customer Overview - Open Sales Documents:

The screenshot shows a table titled "Open Sales Documents" with columns: Type, Doc#, Doc Date, Total, and Req Ship. A context menu is open over the "Doc Date" column, listing options: Sort Ascending, Sort Descending, Clear All Sorting, Group By This Column, Show Group By Box, Hide This Column, Column Chooser, Best Fit, Best Fit (all columns), Filter Editor..., Show Find Panel, and Show Auto Filter Row.

Type	Doc#	Doc Date	Total	Req Ship
ORDER	B9027	10/7/2015	12.27	10/7/2015
ORDER	B9028	10/7/2015	12.27	10/7/2015
ORDER	B9030	10/7/2015	79.38	10/7/2015
ORDER	BO0000001	5/31/2016	39.69	5/31/2016
ORDER	BO0000002	5/31/2016	39.69	5/31/2016
ORDER	BO0000004	1/27/2017	12.27	1/27/2017
INVOICE	CI1204	5/31/2016	39.69	5/31/2016
INVOICE	CI1205	5/31/2016	39.69	5/31/2016
INVOICE	CI1206	5/31/2016	39.69	5/31/2016
INVOICE	CI1207	5/31/2016	39.69	5/31/2016
INVOICE	CI1208	12/12/2016	13.23	12/12/2016
ORDER	D6772	3/4/2014	971.92	3/4/2014
ORDER	D6773	3/5/2014	39.69	3/5/2014
ORDER	D6774	3/5/2014	79.38	3/5/2014
ORDER	DC1394	2/17/2014	274.01	12/17/2014
ORDER	IC0004	3/4/2014	1,239.70	3/4/2014

Customer Contact Address:

Contact Addresses	CRM	Note	A/R	Item History	Sales Documents	Credit Cards	User Fields	Sales Graph	Extended Pricing	Quick Report	Recurring Sales	Default Doc I
[Fast Ship To Ordering Enabled: WAREHOUSE]												
Address Type	Address Code	Address	Phones	Email	Comment							
	JEAN SMITH	Jean Smith Two Microsoft Way Suite 300 DePere, WI 54115										
BILL TO	PRIMARY	Bob Fitz One Microsoft Way, Redmond, WA 9805		billing@afitz.net								
	T BRADLEY	Tim Bradley 222 Warehouse Driv Redmond, WA 9805										
STATEMENT	T HAMMOND	Thomas Hammond Heber City, UT 8403										
MAIN	TOM JONES	Tom Jones 222 Warehouse Driv Redmond, WA 9805			With AFE since 1988							
	TSH	Thomas Hanson 222 Warehouse Drive Redmond, WA 98052-6399	P1: (425) 336-7876 P3: (425) 876-9988									
SHIP TO	WAREHOUSE	Robert Fitz Jr. 1201 56th Ave. Chicago, IL 60603-0776	P1: (312) 555-0102 P2: (312) 555-0102 FX: (312) 555-0102	warehouse@afitz.net								

Sales Fulfillment Plugin - Serial Tracked Items:

Sales Fulfillment - BO0000005

Select a line item:			Fulfillment Detail:				Available to Pick (double-click or use button to select):	
Item Number	Descr	Qty	Serial Numbers	Qty	Bin	Lot ...	Serial Number	
4-E2094A	Laserjet Pri...	0					03-2094-01	
2GB RAM	Ram, 2 GB	0					03-2094-02	
2-A3284A	Dual Core S...	0					03-2094-03	
							03-2094-04	
							03-2094-05	

Show all lines (even ones that cannot be fulfilled)

All changes are immediately saved. You CANNOT cancel your changes.

OK

Security

- *Enable Customer Address Quick Load Grid* - Allows users to use the Quick Load Grid on the Customer Address Tab
- *Enable Open Sales Documents Quick Load Grid* - Allows users to use the Quick Load Grid on the Open Sales Documents grid in the Customer Card
- *Enable Serial Tracked Quick Load Grid* - Allows users to use the Quick Load Grid on the Fulfillment Window