Mapping & Order User Guide

Add Grower, Farms & Fields
Create, Release and Edit Orders
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CUSTOMERS TAB

The Customers tab has two sub tabs, Create/Select Fields, and Create Order.

Create/Select Fields Tab

The mapping page is used for the addition and editing of Customers, Farms, Fields, and Zones. In addition, GIS boundaries can be created, edited, and saved to each field and/or zone name.

There are five major elements of the Create/Select Fields page:

1. **Profile Tree**: This area is used to Add, Edit, Rename, and Delete different elements from the tree, such as Customers, Farms, Fields, and Zones.

2. **Mapping Tools**: The Mapping Toolbar contains all the elements to create, modify, save, view, and process boundaries.

3. **Editor Map**: The Map contains the mapping area used to create or modify Field and Zone boundaries.

4. **Map Table**: The area below the map that shows the fields/zones that are being displayed in the map.

5. **Filter**: The filter allows a user to limit the size of the tree. Filter setups can be saved allowing a user to quickly return to a previous tree.
Profile Tree
This area is used to Add, Edit, Rename, and Delete different elements from the tree, such as Customers, Farms, Fields, and Zones. To expand the tree, click the plus sign or double click the element in which you would like to expand.

Customer Tree Set Up:
The first step in profile creation is to create a customer tree.

Add a Customer Video:

Add a Customer Tree:
Left click your account name in the Profile Tree, and choose Add Customer Tree from the drop-down menu. Enter the Customer, Farm, and Field names. If you chose to add additional fields under this farm you can click the Add Field button. When you are finished, click Save; this customer will now appear in the Profile Tree, or choose Save + Add to Table; which will add customer to Profile Tree and also add fields below map in the Map Table.

Add a Farm:
To add additional Farms right click the Customer name and choose Add Farms from the popup. Once Add Farms is selected, this popup appears allowing the creation of new farms.
Add a Field:

To add a Field right click the Farm name and choose Add Fields from the popup. Once Add Fields is selected, this popup appears allowing the creation of new farms.

Add additional details to the Profile Tree

To make changes or add details to the tree, right click the level you wish to alter. A pop up box will appear, scroll to find category to change.

Additions, view/edit profile data, expanding or collapsing the sub-nodes, renaming, editing billing information, deleting, and refreshing are available modifications.

View – Edit Profile Data: Customer, Farm or Field:

To edit information about an element, choose View/Edit Profile Data. A popup box will appear for making necessary changes or to view the profile data. Additions or changes made in these areas will show up on the work order. Under the Customer Data popup, if an email address can be entered and customer notifications are enabled then the customer receives an email when an order is created, modified, or completed with one of their fields. Multiple email address are entered by separating the address by a semicolon. Another feature here is the billable acres; this will change for billing and work orders and can be reset to match the actual boundary acres if needed.

Rename: To rename an element right click the element in which you would like to change and choose Rename. A popup appears allowing a new name to be entered.

Edit Billing Info: To edit billing information for an element right click the element in which you would like to change and choose Edit Billing Info. A popup appears allowing new data to be entered.
Delete: To delete an element from the tree, right click on the element and select Delete.

Refresh: To update the tree choose Refresh in the popup box. Changes in the tree will show up after a refresh.

**Mapping Tools**
The Mapping Toolbar contains all the elements to create, modify, save, view, and process boundaries.
There are three types of boundary mapping tools: Boundary, Exclusion, Annotation.

- **Boundary Tools** are used to create a New Boundary, Delete, Edit, Drag, Split, and Query Boundaries.

- **New Boundary:** Select any of the following options from the drop-down menu.

- **Draw Boundary:** Left click a corner of the field. Proceed to the next corner and left click again. Continue this procedure until you reach the last corner. At the last corner double click to finish drawing. The boundary drawn should be colored in red.

- **Add Boundary Shape:** Select the tool, a popup box will appear and ask for number of sides for the boundary. Enter the number and click OK. Then left click and drag outward on the map where you want the boundary shape to be placed.

- **Add Boundary from CLU Layer, (Common Land Unit):** Use this tool to select a boundary from the CLU layer.

- **Import Boundary:** Select the tool; a popup box will appear allowing you to browse for the file on your computer and choose your file type. After you have selected the correct shapefile you can click the Import File at the bottom of the window.

- **Delete Boundary:** Select this tool to delete an active boundary within the map. After clicking the icon, select the boundary to delete within the map.

- **Edit Boundary:** Used to modify boundaries within the map. After clicking this icon, select a boundary to edit. Points will appear around the polygon, place the cursor over a point (Note: the mouse will turn into a crosshairs) and click and drag to modify the boundary. Holding the delete key while over a point will delete the point.

- **Drag Boundary:** Selecting, clicking, and dragging allow a field to be dragged to a new location on the screen.
**Split Boundary:** This tool can be used to split a Field or Zone into segments. To Split, click in the middle of the boundary to activate the tool. Draw a line across the boundary to create your split. Double click to finish the split. The split boundary will show the new acres. You can edit the split by clicking on the split line and adjusting.

**Query Boundary:** Click this icon and select a polygon within the map to display details about a Field or Zone.

**Exclusion Zones** are areas within a boundary that need to be marked as exclusion. With this tool you can Draw, Add Zone Shape, Delete, Edit, and Drag the exclusion area.

**New Exclusion Zone:** Click this tool and a drop-down box will appear with options to Draw Exclusion Zone or Add Exclusion Zone Shape to your field.

**Delete Exclusion Zone:** Click this tool to delete exclusion zones on the map.

**Edit Exclusion Zone:** Choosing the edit exclusion tool and selecting the exclusion allows changes to be made, such as modifying the size and shape of the exclusion. Holding the delete key while over a point will delete the point.

**Drag Exclusion Zone:** Selecting this tool and an exclusion, allows the movement of the exclusion across the screen.

**Annotation Tools** can be obstructions, crops, obstacles, notes, or a field entrance. Clicking on this tool allows you to Add, Edit, Delete, Drag, and Query the annotations.

**Add Point or Polygon Annotation:** Click the location on the map where the annotation should be placed or draw the polygon annotation on the map. A popup box will appear with options to choose the annotation, type, access, date and notes. Click Save and annotation will be saved on the map. Note: choosing Public as the access level allows all AgSync users to view the annotation.
Edit Polygon Annotation: Choosing the edit annotation and selecting the polygon on the map allows changes to be made to the polygon. Use the points around the polygon to edit the annotation.

Edit Annotation Details: Choosing the edit annotation and selecting the annotation on the map enables a pop up window to make changes to the annotation type, access, date, and notes.

Delete Annotation: Used to delete annotations on the map.

Drag Annotation: Allows the movement of annotations across the screen.

Query Annotation: Use this tool to view the notes associated with an annotation.

Show/Hide Notes: Click on Show/Hide Notes to toggle annotation notes to be displayed on the map.

Other tools in the Mapping Toolbar include:

Save Boundary: Click and choose from the drop-down menu:

Select Boundaries to Save: Used for saving boundaries chosen on the Map by clicking it.

Save all Boundaries: Used to save all boundaries created and shown on the Map.

Save Edits: Used to save edits made to previously saved boundaries.

Print: Click to print a Field Map. Maps can be printed in Map Zoom level, which will print at the zoom level visible on the screen. Or print in Buffer in which you can type in the distance you want the zoom to print. The Lat/Lon can also be changed to display in decimal, degrees minutes or seconds. Notes may be entered, which will display on the reference page.

Send to Order: Click and choose from the drop-down menu to send All Selected Boundaries or All Table Boundaries to an order.

Export Boundaries: Click and choose from the drop-down to export All Selected Boundaries or All Table Boundaries to an order.

Pan Tool: Click and drag on the map to locate a field to the North, South, East, West, etc.

Measuring Tool: Click to measure short distances in feet or longer distances in miles within the map. Click a point within the map and continue clicking on other locations to measure the total distance. To stop measuring, simply double click the map.
**Goto:** Choose between entering Latitude & Longitude, Address, PLSS, or Township information to zoom to a specific field or region.

**Zoom:** Click and choose from the drop-down menu:
- **Zoom to Start Location:** Used to zoom to the Set Start Location.
- **Zoom to Selected:** Used to zoom to the fields selected in Map Table.
- **Zoom to Table:** Used to zoom to all fields in the Map Table.
- **Zoom to US:** Used for zooming in or out to view entire US.

**Set Start Location:** Used to set the Start Location that will be the default location for the user.

**Select:** Allows for the selection of boundaries on the map to save as a specified field or zone. After selecting this tool, click the desired boundary. Clicking on a selected boundary will unselect the boundary.

Tip: You can unselect the tool you are currently using by choosing the Cancel Active Tool tab on the right of the mapping toolbar.

Tip: You can clean the map of all unsaved or unnecessary items by choosing Clear Map Tool on the right of the mapping toolbar.

**(Editor) Map**
The Editor Map contains the mapping area used to create or modify Field and Zone boundaries. In conjunction with the background imagery and roads, the zooming tools are used to locate fields in order to create boundaries.

**Background Imagery:** Click this icon in the upper right corner of the map to expand the ‘Map Layer’ options. Select the Base Layer and desired overlays to appear as the background within the map. A user can customize the allowed layers and defaults in the account settings layer configuration tab.

**Pan Tool:** Click the arrows to pan the map North, South, East, or West.
**Zoom Tool:** Click the – to zoom out. Click the + to zoom in. Click and drag up or down to zoom in or out faster.

Tip: Rolling the scroll button on the mouse activates the zoom in and zoom out functions.

**Right-Click on Map:**

By right clicking a boundary on the map a pop up window with various options and or tools becomes available. Options include: Query Boundary, Remove from map/table, Delete Boundary, Edit Boundary, Drag Boundary, Split Boundary, Edit Boundary Note, and Edit Field Data.

**Map Table**

The map table shows the fields/zones that are being displayed in the map. To add fields to the Map Table, choose the farm or field in the Profile Tree. Then left click and drag to the Table to be displayed. The size of the table can be adjusted by placing the mouse above the column headers and dragging the window towards the bottom of the screen. Clicking on an item in the table will select it in the table and the map, turning it yellow. To select several fields on the table, hold down shift and click the additional field(s). To unselect a field on the table, hold down control and click on the item.
While in the table, columns can be reordered, sorted, and displayed. To reorder, left click the column and drag it to the desired position. To sort fields in ascending order, click the column header and choose ascending order. To sort in descending order, click the column header again and choose descending order.

Customizing the table is accomplished by placing the mouse over the right side of a column header, clicking the drop-down arrow then choosing Columns. You can then check or uncheck the desired columns to be shown on the Map Table. To remove boundaries from view, use the Remove Selected or Remove All.

**Workspace**: Set up used to customize the table features. User can choose which columns to view.

**Workspace on Mapping Page**

Workspaces allow a user to modify and save a preferred view of a table. Columns can be rearranged, opened or closed to view specific criteria. Once decided this display can be saved as a workspace that the user can make default to their account or set up to view when needed. Workspaces can be edited and deleted also.
Tip: Workspaces are available in several table structures throughout the AgSync system. Look for the Workspace icon, to modify those tables.

Filter Profile Tree

The filter allows a user to limit the size of the tree. Filter setups can be saved allowing a user to quickly return to a default. (A) You can Add, Edit, Delete, and Reset Filters. Once a filter is saved it can be picked from the Saved Filters drop-down box (B) Attributes of the particular filter will appear beneath it, in the Profiles, Products, and Date Range boxes.

Add Filter: To create a new filter, click ‘Filter Actions’, then click ‘New Filter’, and a popup window appears. On the left side of the window is the tree; on the right is the filter template.

1. Filter Name: If the filter is to be saved, place a name in the Filter Name box.
2. Profiles: If filtering by profile, simply click and hold the left mouse button on the needed boundaries in the tree and drag the boundaries underneath Profiles.
3. Tab Access Option: Choose set as default to apply the filter as the default.
4. Save: After adding a filter click Save to save for future use, or choose Apply which applies to current use and is not saved.

Edit Filter: To edit a filter choose a saved filter from the Filter window and click Filter Actions then the Edit Filter. A popup window will appear allowing you to make the necessary changes.
After making edits click Save to save for future use, or choose Apply which just applies to current use and is not saved.

**Delete Filter:**
To delete a filter choose a saved filter from the Filter window and click Filter Actions then click Delete Filter.

**Reset Filter:** Click this button to go back to the default state in the tree, and close out the current filter.

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**Boundary Creation Process**

**Adding a New Field Boundary Using the Map**

1. Create a Customer, Farm, and Field using the steps in Profile Tree section.
2. Find the field to add the boundary to. Left click the field and drag to the Map Table underneath the map. Then click the field in the table to select it. The selected fields will be highlighted in yellow. To unselect a field on the table, hold down control and click the item. This also works when unselecting a boundary on the Map.

![Map interface with boundary creation process](image)

3. Navigate to the Field utilizing the background imagery and zooming features on the map. If a Latitude/Longitude, Address, or County/Township/Range of the field or nearby location is known, use the Goto icon in the tools area.

4. Click the ‘Boundary Tools’ icon in the mapping toolbar. Choose whether to Draw, Add Boundary Shape, Add Boundary from CLU, or Import Boundary.

Click the Save icon in the tools section to save the boundary to the selected Field. Choose Save All Segments to save all boundaries to the highlighted field.

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**Copy Boundary to new field:** [http://ticket.agsync.com/osticket/kb/faq.php?id=5](http://ticket.agsync.com/osticket/kb/faq.php?id=5)

Adding Multiple Field Boundaries Using the Map

1. Create a Customer, Farm, and Field(s) using the steps in the Customer Tree section.

2. Open the customer, and farm. Find the fields you wish to add the boundaries to, left click and drag each of the desired fields to the Map Table. Select the first field to save to the table.

3. Navigate to the desired field utilizing the background imagery and zooming features on the map. If a Latitude/Longitude, Address, or County/Township/Range of the field or nearby location is known, use the Goto icon in the tools area.

4. Click on the Boundary Tools icon in the mapping toolbar. Choose whether to Draw, Add Boundary Shape, Add Boundary from CLU, or Import Boundary.

5. Repeat steps 3 and 4 until all of the boundaries are red.

6. Select the Save icon in the tools section and choose Select Boundaries to Save.

7. Click the red boundary in the map which belongs to the selected field in the table. Then choose Save. If more than one boundary is associated with the field, repeat this step until all of the boundaries are saved.

8. Select a new field in the table.

9. Repeat steps 7 and 8 until all boundaries are saved and colored green.

Importing a Field Boundary Shapefile

Many times, a field boundary was already created using a GPS unit or third party mapping program. These third party mapping programs typically have the ability to export a field boundary as a shapefile. To Import into AgSync, the shapefile must be zipped and contain the file types displayed below.

- TextBoundary.dbf - DBF File
- TextBoundary.shp - SHP File
- TextBoundary.shx - SHX File
1. Click and drag the desired field from the Profile Tree into the Map Table.

2. Select the Import Boundary tool from the Boundary tool drop-down menu, a popup box will appear allowing you to browse for the file on your computer. After you have selected the correct shapefile, you can click the Import File at the bottom of the window.

3. Browse your computer for the zipped shapefile. Once found click open.
4. Click the Import File button.

5. The boundary will appear on the map and user can then click the Save tool and click Save all Boundaries.

**Exporting Boundary**

1. Click and drag the desired field from the Profile Tree into the Map Table.

2. Click the Export boundary tool.

   Video available. [http://www.agsync.com/Flash/exporting a field video.swf](http://www.agsync.com/Flash/exporting a field video.swf)

3. From the popup window choose the Export Type from the drop-down box.
4. Click Export to download the field(s) to computer.
5. Click Download to download the file.

**Boundary Editing Process (Editing an Existing Field or Zone)**

[Diagram of boundary editing process]
1. Click and drag the desired field from the Profile Tree into the Map Table.

2. Click the Edit Boundary icon under the Boundary tools in toolbar.

3. Click the boundary on the map to edit.

4. The boundary will turn yellow with red edit points. Use the points around the boundary to modify the Field or Zone.

5. Click the Save icon in the tools section and choose the Save Edits icon.

Note: To Delete the Field or Zone boundary, select the Delete Boundary icon and click the boundary to delete. Navigate to the proper area of the map, select the Draw Boundary icon and begin drawing the Field or Zone. Remember to Save the boundary.

**Create Order**

When the Create Order tab is active a user can view the create order page. There are 5 sections to the create order page Order Details, Boundary Selection, Product Details, Select Carrier, and Crop Selection.

**Order Details**

The first step in filling out an order is to choose the Retailer, Applicator, Operation, and Status.


**Retailer:**
The Retailer is the company creating and placing orders. The retailer is also the owner of the order, that is who is able to edit it until the accepted status.

**Applicator:**
The Applicator is the company in which you are choosing to send the order to. Your company may be linked to one or more Applicators.  
Note: The Taskforce-Central and AgSync-Manager Package users will choose themselves as the applicator.

**Operation:**
The operation is the method in which the products are to be applied.  
Note: The Taskforce-Central and AgSync-Manager Package can customize their list of supported operations.

**Order Status:**

**Plans:** Application Plans are created to assist in the planning phases for the upcoming season. Typically, Plans are created prior to planting. With this in mind, a field can be included in multiple plans with different crops since the crop planted may still be undecided. Instead of scrambling to create orders a few weeks prior to the applications, the Plans can be saved months ahead of time.

**Booked:** Booked Orders are created and sent to an Applicator when the Retailer and/or Grower have made the decision to apply the field(s). In other words, the crop planted, chemicals to be applied, etc. are all known and verified. The only unknown variable is the date range for the application. Booked Orders are created to alert the Applicator of your intentions so they can plan ahead. Typically, Booked Orders are created and submitted within a month after planting.

**Released:** When the Retailer and/or Grower decided on the date or date range for the application, the Booked Orders can be ‘Released’.

**Scheduled:** A Scheduled order is an order which the applicator has planned an application for the order. At this point no edits may be made on the order for anyone.

**Completed:** Completed Orders have all of the required information and are ready for invoicing.

### Add Boundary to Order

To add boundaries from the tree, click and hold the left mouse button on the field. Then, drag the field underneath the table and release the mouse button. The Remove All button will remove all boundaries currently in the order. Fields may also be removed individually by selecting on the field and clicking the Remove Selected tab at the bottom of the screen.

Workspaces can also be set up for this table.
**Edit Billing Information:**
If billing information is needed, select the Billing Info Icon, located below the boundary selection title bar. To edit the billing information, follow the steps below.

1. Select the fields to bill.
2. Choose the Billing Entity from the drop down.
3. If all fields in the order have the same billing, click the Add to Bulk Grid. If a field or certain fields have different billing, then place a checkmark next the orders and select Add to Custom Grid.
4. If split billing is required, add another billable customer; then define the Percent Charge. To define the Percent Charge, double click next to each product and application charge and select the percentage to charge to the customer.
5. Save or Cancel

**Note:** The default billing for a customer can be set up by editing the billing information for the profile in the tree.

**Attach Files:** If additional files are needed, a user can attach them to the order.

**Product Details Section**

The Product Details section defines which products to use. Choosing the Product List allows the user to distinguish between loading the applicator’s product listing or the retailers, this applies to both Custom products and Programs.

Workspaces can also be set up for this table.
Add Product

Click the Add Product to add the product to the order. A pop up appears to choose Product Source and Product Selection.
The Product Owner/Supplier is the customer/company is responsible for billing the product. The Product Delivery Type is either Unmixed/Packaged or Premixed/Hot loaded. If the chemical is coming to the load site premixed, then choose premixed.

There are 2 ways to select products by Custom Product or Custom Fertilizer. Custom Products are products which are saved for future use. If you do not find the product you are looking for, click add product to add a product to your listing. Rates may be added by clicking the add rate button. A pest may be added to the order by clicking the select pest button.

Custom Fertilizers

The custom fertilizer screen is used for adding blends and fertilizers of different analysis to an order. To add a Custom fertilizer, first choose the chemical state. Then enter the percentage of each nutrient. Choose a rate type, type in a rate, choose units of application, and click add product. If the chemical state is set to Liquid, the density may be entered and the product can be added as a carrier.

Add Program to Order

If Program is chosen, the choice is the possible programs that were created for the chosen Applicator, Operation, and Product List.
Add Crop Selection

Select a crop and a target growth stage for the order. Each field in the order must have the same crop and growth stage.

ORDERS TAB
The orders tab has three sub tabs, List/All, Calendar, and Order Map.

Order Tab Tools
The tools available on the List/All page toolbar include: Change Status, Send to Map, Print Reports, Cancel, Color, Edit Order, and the Filter tools.

The status of all Orders can be viewed, edited and released within the Orders page.

Change Status: Click and change the status of an order to: Planned, Booked, Released and Cancelled.

Send to Map: Click to send all checked orders to the map.

Print: Chose this icon to print selected reports.

Delete Orders: Choose this tool to delete selected orders. Orders must be chosen in the table below the toolbar.

Legend: Choose this tool to customize with color. These settings can be saved and used for planning or other ways of organizing data.

Edit Orders: Choose this tool to edit order(s), Re-assign Retailer, Re-assign Applicator.
Viewing Orders

By default, all orders under your account will be shown on the screen. You can scroll through to find a particular order. Selecting a template from the Saved Filters drop-down box or using the Quick Search box are other ways to view orders. To display Plans or Orders using the Quick Search box, pick the criteria in the dropdown box, then type in the data that corresponds to the criteria in the text box to the left. Then click on the search icon or press the enter key.

All details regarding an Order can be viewed in the Orders Page with the most significant being the status of the Order. Once an Order is released, the Applicator can then Accept and Schedule the Order. Once an Order is Accepted by the Applicator, the Order can no longer be edited by the Retailer. When the Applicator completes the application, the status will be changed to Complete. All status changes can be viewed real time within the Orders Page.

Editing Orders

If a decision has been made regarding the application date(s) of a Plan or Booked Order, the dates can be edited and the Plan or Booked Order can be changed to the Released status. This alerts the Applicator that the Order is prepared for Scheduling.

1. Locate and check all Plans or Orders to be edited.
2. Right click an Order that is checked, and then click Edit Order. This will display the Edit Order popup window where the Order can be edited or the status can be changed.
3. Edit the date range.
4. To Release an Order, click the Order Status dropdown arrow and change status to Released.

5. Click the Save button and the fields in the Order have been changed to Released; the Applicator is now alerted to spray the fields.

**Print Reports**

Depending on the account type and the settings, the Print Report drop down will contain several report options.

**To print reports for specific orders**
1. Select filter parameters.
2. Click the check box in the header to check all orders in the list or click and check individual field orders to include in the report.
3. Click the Print Reports icon. Choose one of the available reports.
Orders Page Setup

The Orders Page has options to display only the columns the user wishes to view, rearrange the columns in order preference, or display a certain number of orders per page.

1. To turn columns on or off click the header title arrow and a drop-down menu will appear.
2. Choose Columns.
3. Uncheck all columns that will not be displayed.
4. Click and drag columns to change the order they are displayed.
5. To setup the number of Orders displayed per page click the page size arrow and pick the number to display per page.

Filter Orders

Advanced Search tool. With this tool a user can enter specific criteria to narrow down the available orders. Once clicked a Filter Setup pop up will appear. The first tab in the Filter pop up is the Search tab. This page is used as a basic filter for viewing the orders page. The user enters the desired criteria and chooses to Search, Reset, Cancel or Reload the data.
The second tab is the Advanced/Save Filter. This page allows for more detailed requirements and allows the user to save this setting to use over again. The user can Apply the advanced filter or save as new for future use.

![Advanced Filter](image)

### Display User Filter tool.
With this tool a user choose to display Default-Scheduled orders or choose from filters the user set up before and saved. Test and test2 are examples of customized filters available. Once a filter is chosen the orders table will display the orders which meet the criteria.

![User Filters](image)

### Cancel Filter tool.
Clicking on this icon will remove all filters on the table and return the page to the default view.

At the end of the Orders page toolbar is the Fit Columns control and the quick search box.

![Table Toolbar](image)

The Fit Columns control brings all available columns into view on the orders table when checked.
The quick search box allows a user to type in specific details into the Type here to search box and choose type in the drop down menu. This search brings up a very specific result depending on the criteria. For example, a user can look for a specific order number, or look for all the orders by a particular customer. The image below shows the available categories to search.

![Search Categories](image)

To return the orders table back to the default view, choose the Cancel Filter tool.