Shopping Cart: Queries, Personalizations, Filters, and Settings on the Shopping Cart Home Page

Use this Job Aid to:

- Learn how to organize the Shopping Cart home page so that it is easier to use.

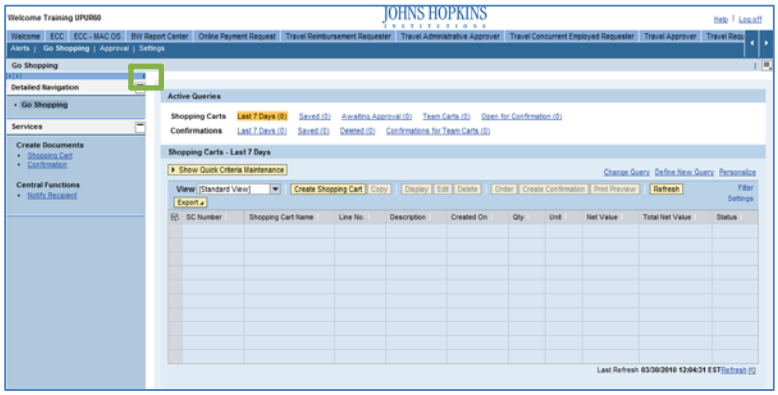
BEFORE YOU BEGIN

You must have your end user settings established before you begin.

Using Queries, Personalizations, Filters, and Settings

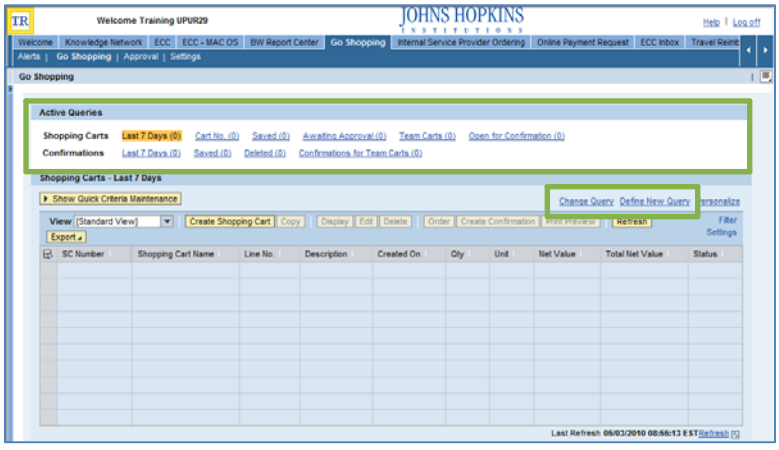
The Shopping Cart Home Page provides a dashboard for conducting all of your shopping activities, including placing orders, approving orders, confirming orders, and checking the status of orders. You can customize this screen in many different ways to make it easier to use for your specific requirements. Note that the instructions contained in this Job Aid are just suggestions – you should work with the queries, filters, personalizations, and settings to make the home page work for you.

1. **Close Detailed Navigation Panel.** We recommend that you close the blue "Detailed Navigation" panel on the left side of the screen by clicking on the small ◀ in the top right corner of the panel. This will make the rest of the screen fit much better and will reduce the amount of scrolling you need to do to view your order information.

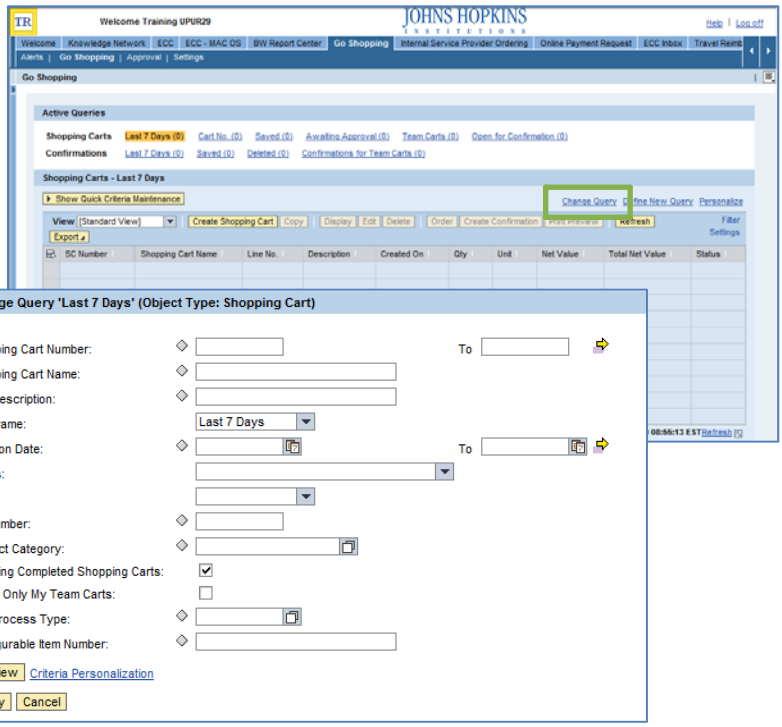


2. **Default Active Queries.** When the Shopping Cart Home Page first appears, you will see "Active Queries" at the top of the screen. This is where you should see the queries that you use most frequently, similar to Internet "favorites."

   - If the queries that appear by default don't fit your needs exactly, you can change them or define new queries to meet your needs.
   - The "**Change Query**" and "**Define New Query**" links are located on the right side of the screen under the Active Queries.

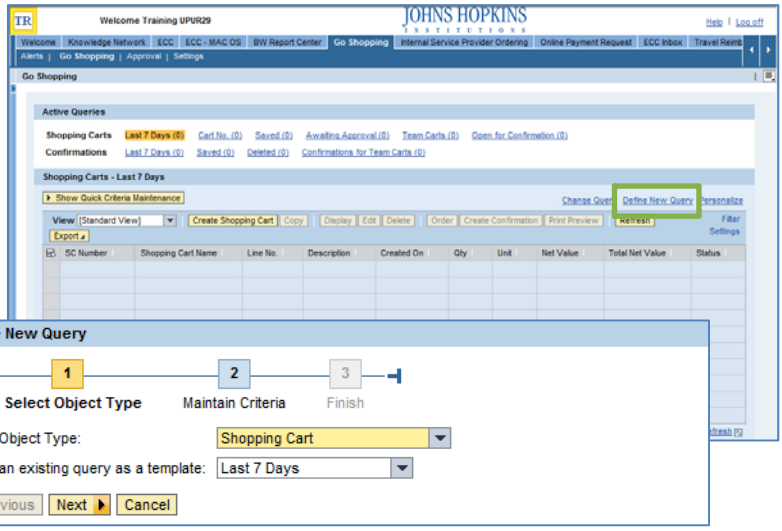


3. Change Query. If there is an existing query that is close to what you need, but needs minor adjustments, you may choose "Change Query" to adjust it. Note that you cannot change the query name using the "Change Query" approach, so you should limit your changes to minor adjustments. To make significant changes that would require a name change, you should either define a new query or use "Personalizations" to change the query name when you have finished making your adjustments.



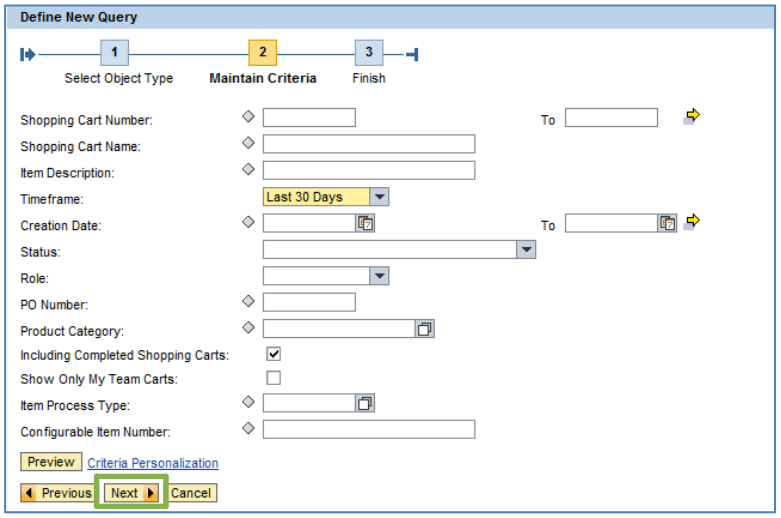
- Start by clicking the "**Change Query**" link while you are displaying the query that you would like to adjust (you can see which query is active because it is highlighted in orange). In this case, we are changing the "Last 7 Days" query.
- The "Change Query" screen will appear and you can change the parameters to whatever you like. For example, you may wish to exclude "Completed Shopping Carts" from the "Last 7 Days" query to make your list shorter.
- You may click on the "**Preview**" button to show the query running on your own data.
- When you are satisfied with the results, click "**Apply**" to change the query with your new selections.

4. Define New Query. If you would like a new query to appear at the top of your screen (i.e., "Last 30 Days") you can do so by defining a new query.



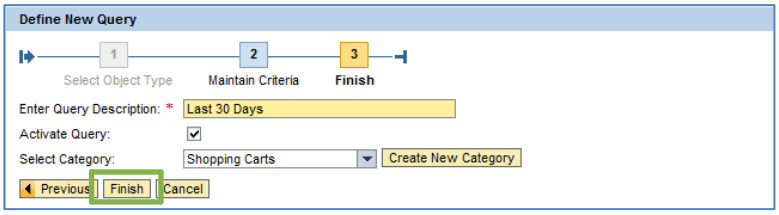
- Start by clicking the "**Define New Query**" link.
- There are 3 steps to defining a new query (as shown at the top of the "Define New Query" dialog box). The first step is setting up object type.
- In the "**Select Object Type**" dropdown menu, select the object type that best matches your query. In this case, we'll choose "Shopping Cart" to create a new shopping cart query.
- If you would like to base your new query on an existing query, select one from the dropdown menu labeled "**Select an existing query as a template**." In this case, we are basing the new query on the existing "Last 7 Days" query.
- Click "**Next**" to continue.

5. **Define New Query – Step #2.** In the next step you will assign the criteria to your new shopping cart.



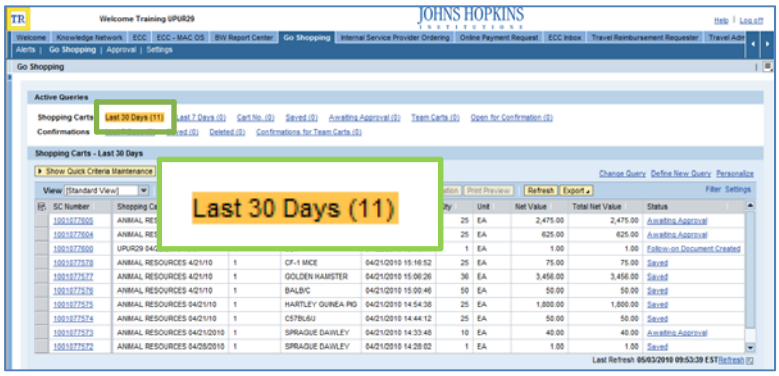
- In this case, we'll change the timeframe to "Last 30 Days" by clicking in the "**Timeframe**" field and selecting "Last 30 Days" from the dropdown list. Enter any other criteria you wish to include on this screen.
- When you have finished entering the query criteria, click "**Next**" to continue.

6. **Define New Query – Step #3.** In the final step you will name and save your new query.



- Enter the new name in the "**Enter Query Description**" field. In this case, we'll name the new query "Last 30 Days."
- To make the new query available from your Shopping Cart Home Page, click the checkbox next to "**Activate Query**."
- Select the appropriate category for the new query from the dropdown list next to "**Select Category**." In this case, we've chosen "Shopping Carts." If you want to set up a new category, you can do so by clicking on the "Create New Category" button.
- When you have finished naming the query, click "**Finish**" to continue.

7. **Define New Query – Finished.** You will return to the Shopping Cart Home Page and your new query will appear in the list of "Active Queries" at the top of the screen. You can now start using the new query.

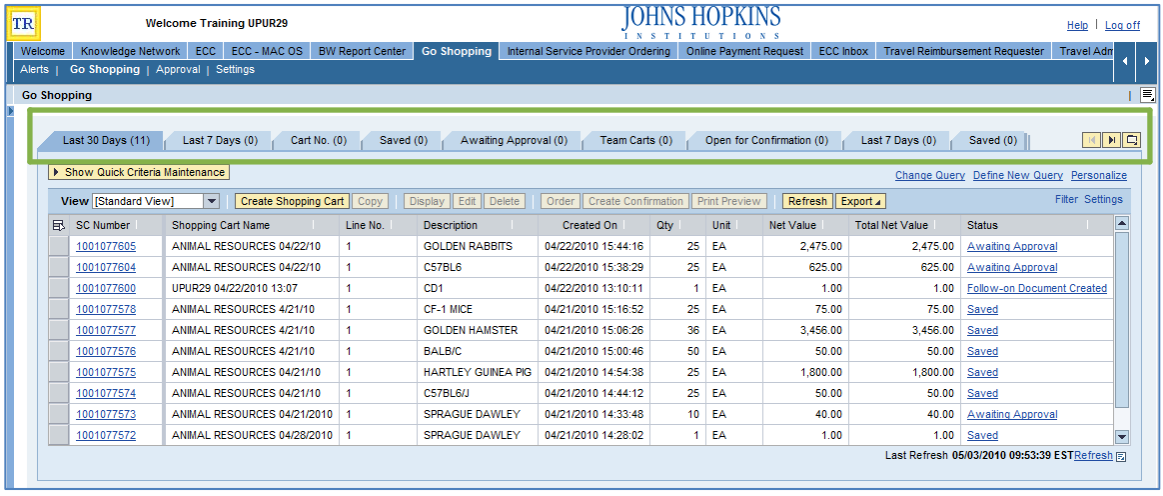


8. **Personalizations.** "Personalizations" allow you to adjust the home page to your specific requirements. There are two tabs: Personalize View and Layout.

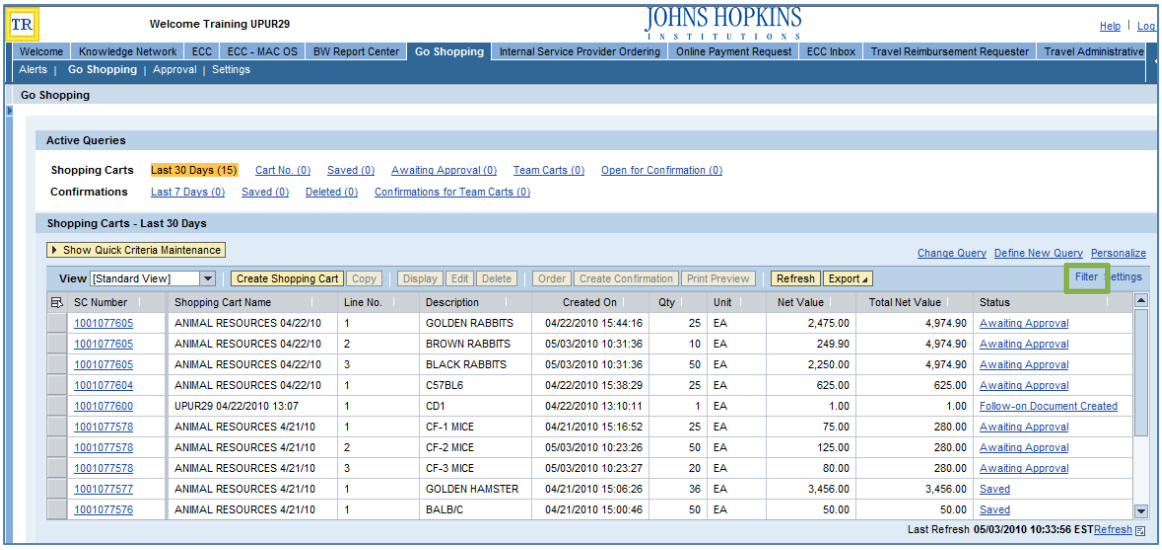
- "**Personalize View**" allows you to delete and rename queries, add and remove queries from your "Active Query" list (queries that are shown on the home page), and adjust the order of the queries show in the Active Queries list.
- For example, now that we have a new "Last 30 Days" query, we may want to delete the "Last 7 Days" query. Personalizations allow you to do so.
- To select a query to adjust in any way, click on the gray box to the left of the query name, and then select the action to apply.

9. **Personalizations.** The "Layout" tab allows you to change the way the Active Queries are shown on the Shopping Cart Home Page. The default view is the "Link Matrix" – a row of links as shown to the right.

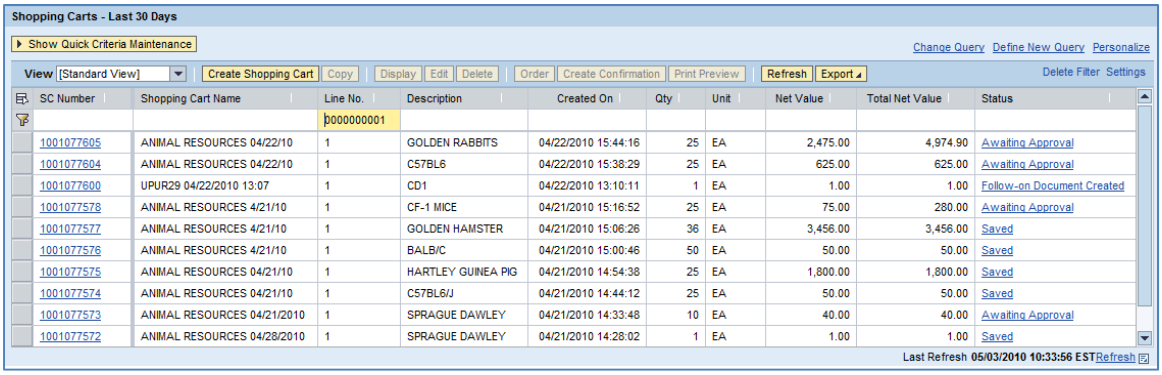
- You may choose "**Tabstrip**" to change the layout to a row of tabs similar to what you might see in Internet Explorer. A sample of this layout is shown below.
- To change the layout, just click on your selection and then select "**Apply**."



10. Filters. Use filters to adjust the way the carts are listed on the Shopping Cart Home Page. For example, by default the homepage displays every line in every cart. To adjust the settings so that just the first line of every cart is shown, you can use a "Filter." To do so, follow these steps:



- Click "**Filter,**" located on the right just above the list of carts. You will then see the a filter icon appear above the list of carts.

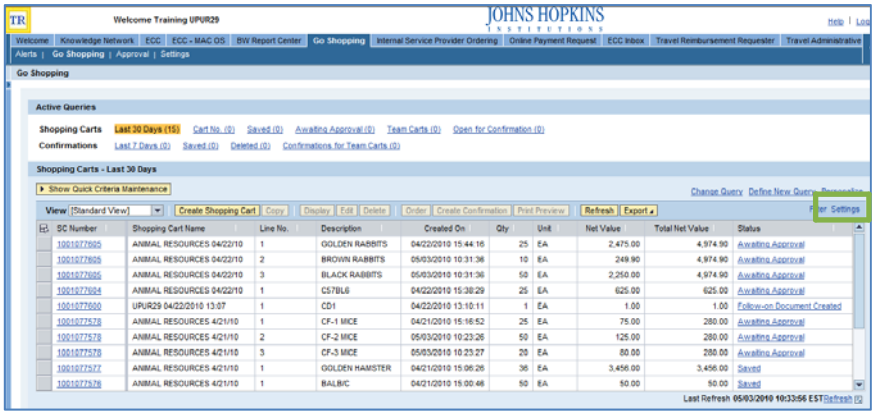


- Enter a "1" in the column labeled "Line No." and then press the Enter key. This will filter out any line item that does not have a Line Number equal to "1." This means that every cart will be included in your list, but only the first line item of each cart (or "Line Number 1") will be displayed.

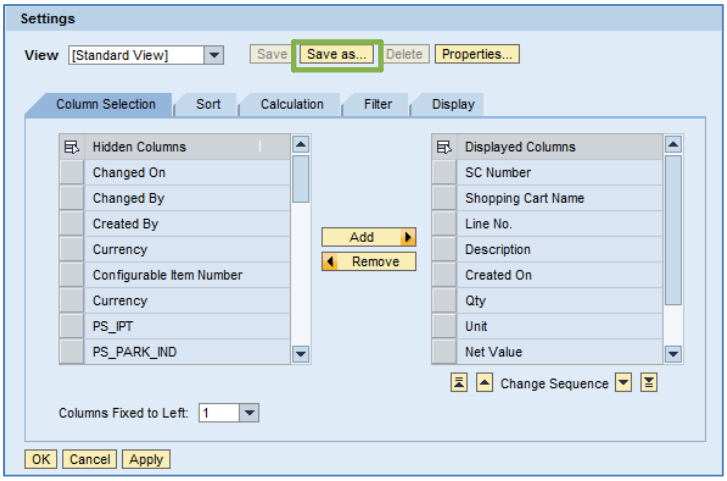
- You may follow this approach for any of the other columns on this page. For example, you may wish to display only those carts with a value over $500. To do so, you would enter ">500" in the column "Total Net Value."

- To remove a filter and return to the default display, click "**Delete Filter**" (which replaces "Filter" when a filter is active).

11. Settings. Use settings to adjust the layout of the Shopping Cart Home Page. The "Settings" window (as shown below) will appear above the list of carts.



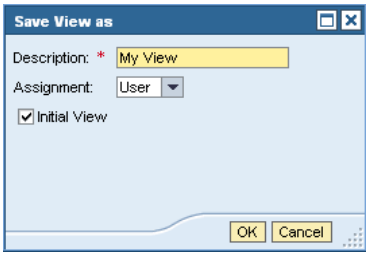
- Use the "**Column Selection**" tab to identify the columns that you would like to be displayed. For example, you may choose to remove the "Net Value" column and leave only the "Total Net Value" column, showing the total value of the cart rather than the individual line item values. This can help make the display smaller, reducing the amount of left-and-right scrolling you need to do.



- Use the "**Sort**" tab to determine how the carts in your list will be sorted. For example, you may wish to sort your carts by shopping cart number or by date.

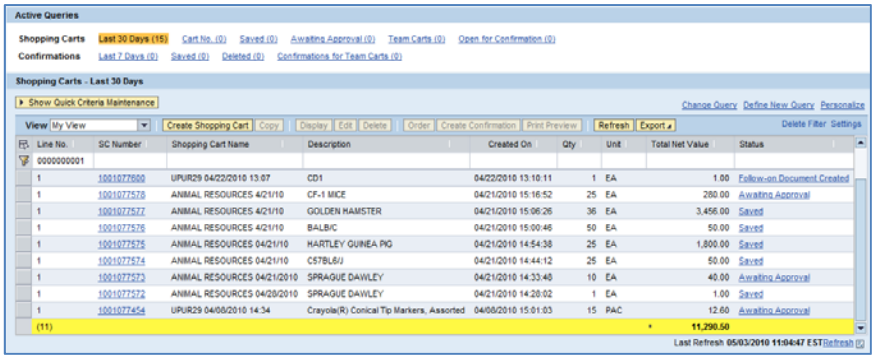
- Use the "**Calculation**" tab to add calculations to your display. For example, you can display the "Total Net Value" of all of your active carts by selecting "Total" under Calculation for the "Total Net Value" field.

- Use the "**Filter**" tab to apply filters as described above. This is useful if you would like your filters (such as the filter to "Line 1") to be displayed *every time* you access the Shopping Cart Home Page. Otherwise, you need to apply the filter each time you access the system.



- Use the "**Display**" tab to adjust the number of rows that are displayed, how many columns are displayed, the table design, and whether grid lines are displayed.

12. Save Your Settings. After you have made your settings adjustments, you will need to save your settings under a new "**View**." To do so, click the "**Save as…**" button.



- Enter a name for your new "View" in the "**Description**" field. In this case, we've called it "My View."

- Leave the "**Assignment**" field set to "User."

- Check the box labeled "**Initial View**" if you would like your new view to appear each time you log back into the system. If you don't check this box, then you will need to re-select your settings and/or your view each time.

- Click "**OK**" to apply your changes. The screen shown above shows how your new home page might appear.