Customizations Using Fiori Sales App (FSA)

Introduction

The Fiori Sales App (FSA) includes customizable filters and settings which allow everyone to create outputs in a way that make sense to them. We encourage you to use FSA to your benefit, while increasing efficiency in order to better support your customers.

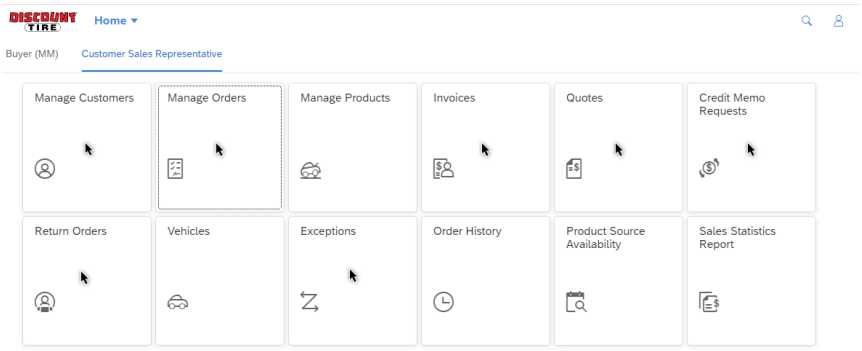
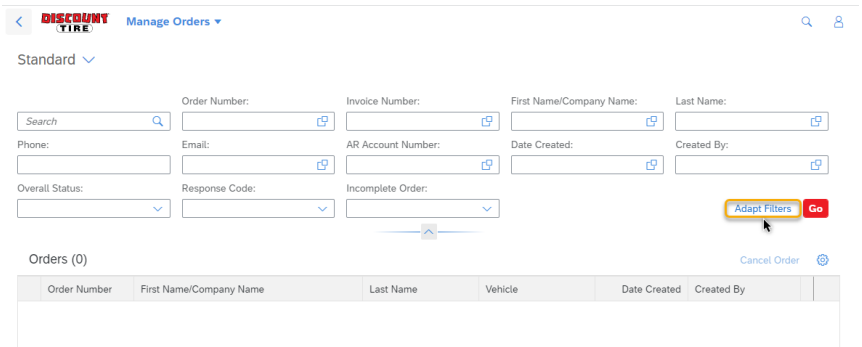
Purpose

The purpose of this document is to guide employees through customizations within tiles using the Fiori Sales App.

Customizing Adapt Filters

The Adapt Filters apply to the individual search fields displayed in the top half of the screen, as known as the header.

Follow these steps to use Adapt Filters:

Step	Action
1	Click one of the listed tiles and open the tile screen. Note: The tiles that use filters are Manage Customers, Manage Orders, Invoices, Quotes, Credit Memo Requests, Return Orders, and Exceptions.  The Adapt Filters function is located in the bottom right corner of the header, next to the Go button. 

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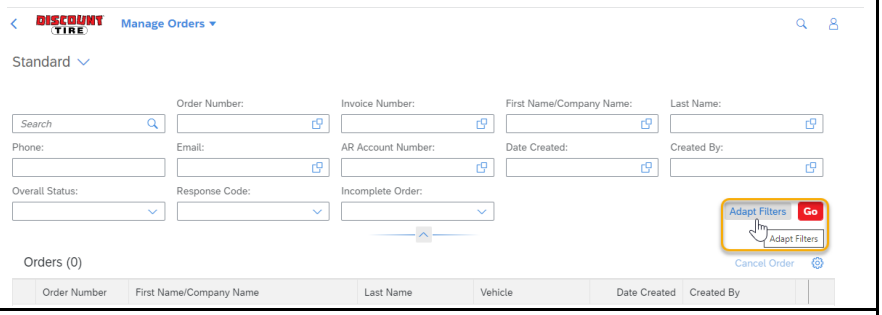
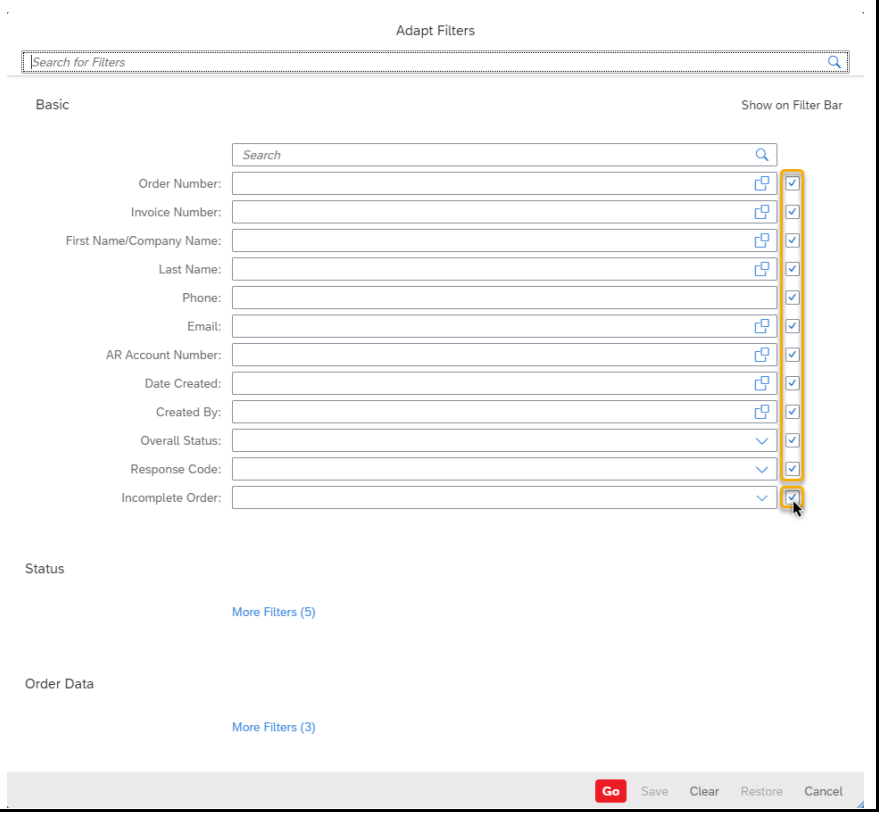
Customizing Adapt Filters

2	Click **Adapt Filters**. 
3	Choose filters to display or be hidden, using the blue checks and check boxes. 

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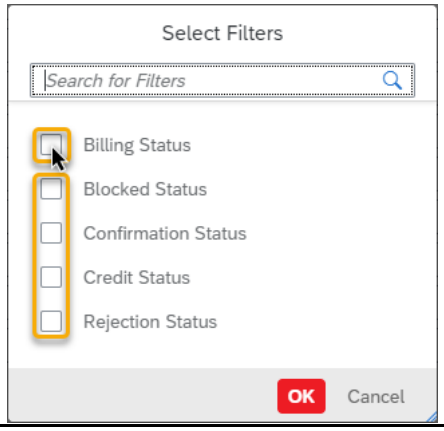
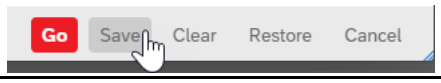
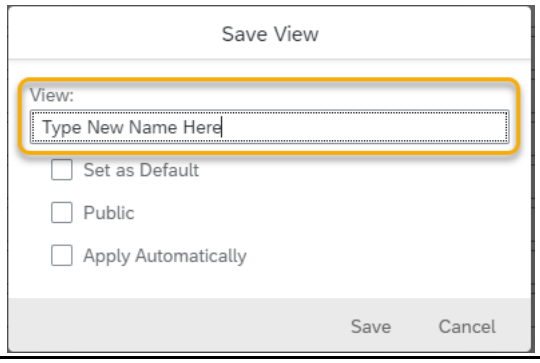
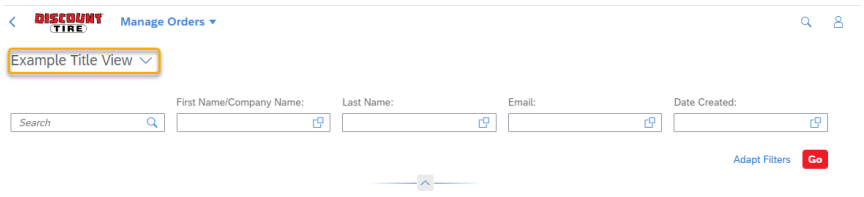
Customizing Adapt Filters

4	Click **More Filters (#)** to see more filter choices. Choose filters to display or be hidden using the blue checks and check boxes. Use the *Search for Filters* bar to refine the search by spelling. 
5	Click **Save** after choosing check boxes. 
6	Choose a title for the **Save View** . The view will be created as private if Public is not chosen by the check box. The Public check box allows others to use the saved filter. 
7	The new filter choices are applied with the new title, for example “Example Title View.” 

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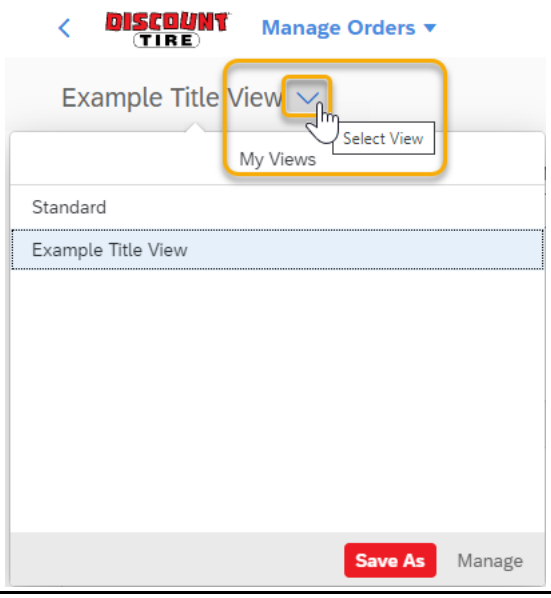
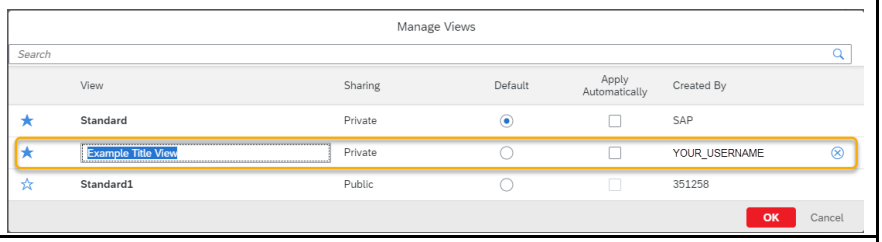
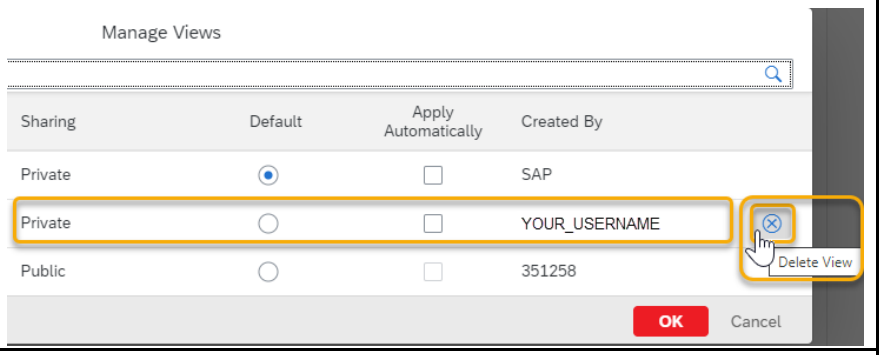
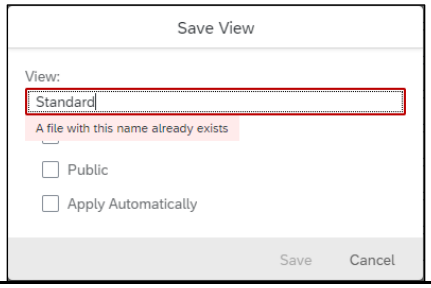
Customizing Adapt Filters

8	Click the down arrow to choose any saved Select View option. 
9	Click **Manage** to edit any of the saved views you created. Some views are created for all users and can only be edited by the original creator. 
10	Click **Delete View** to remove any views you created. The blue "X" icon appears when the cursor hovers at the end of the row. 
11	 Note: Once a View file name has been created, it cannot be used again. A message will appear, "A file with this name already exists."

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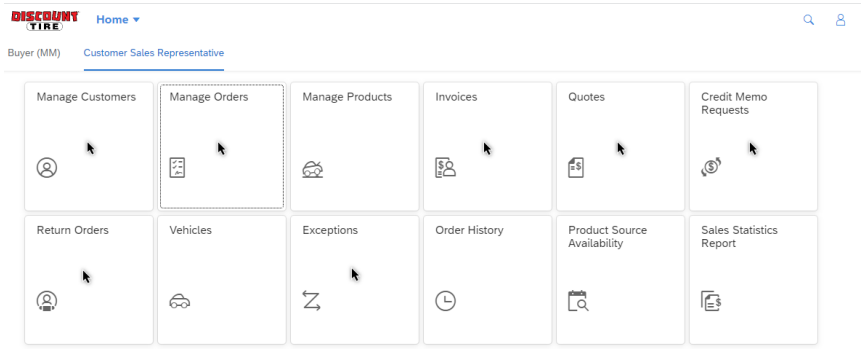
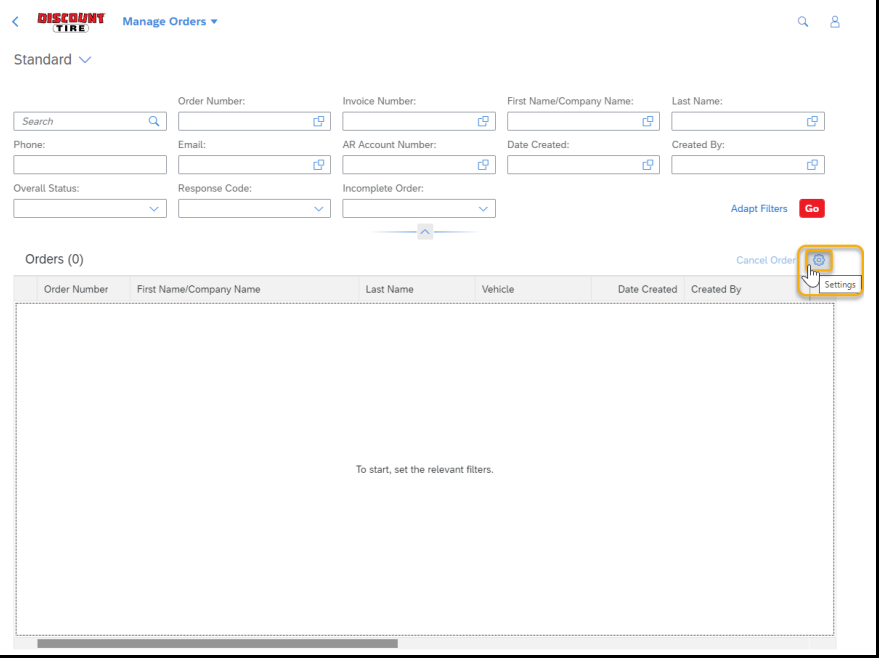
Customizing Settings

The settings apply to the results view from the filters in the bottom half of the screen, showing the field names from the header.

Follow these steps to use settings:

Step	Action
1	Click one of the listed tiles and open the tile screen. Note: The tiles that use the settings functions are Manage Customers, Manage Orders, Invoices, Quotes, Credit Memo Requests, Return Orders, and Exceptions.  The Settings function is located in the top right corner of the results table, showing a gear or cog button. 

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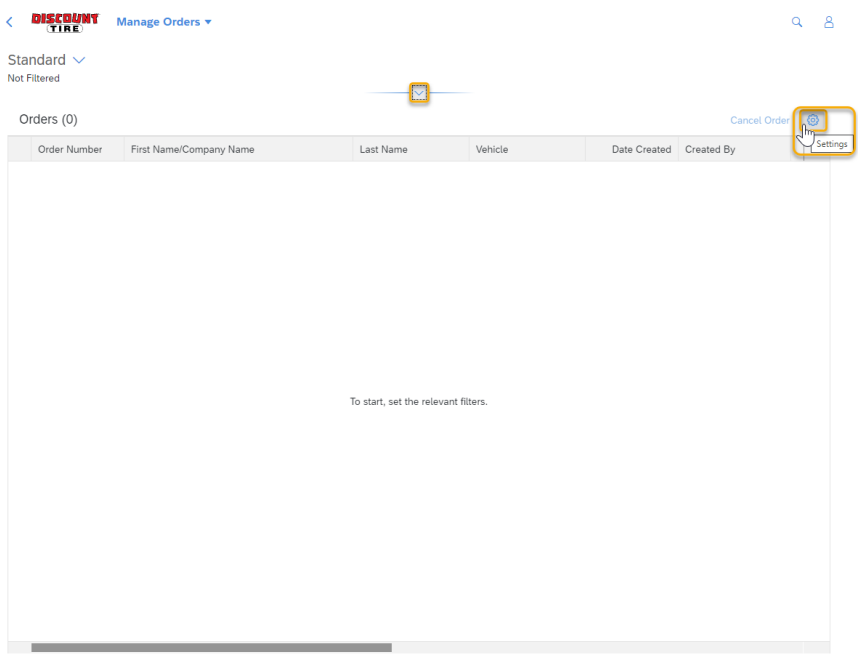
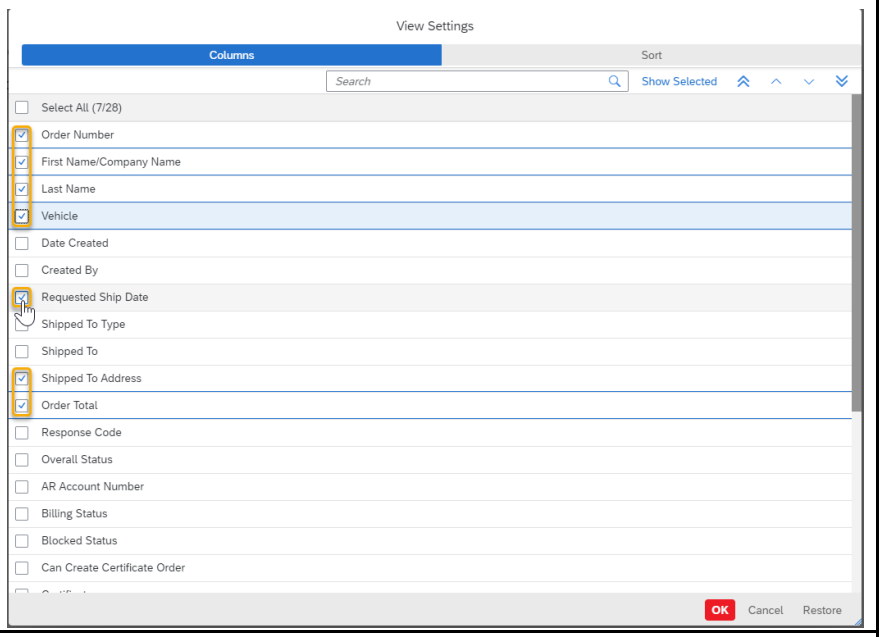
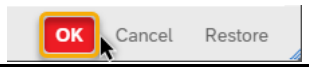
Customizing Settings

2	Click the up arrow to collapse the header to give the results table more viewable space on the screen. Click the down arrow to expand the header. 
3a	Choose filters to display or be hidden using the blue checks and check boxes. 
3b	Click **OK** to complete your choices. 

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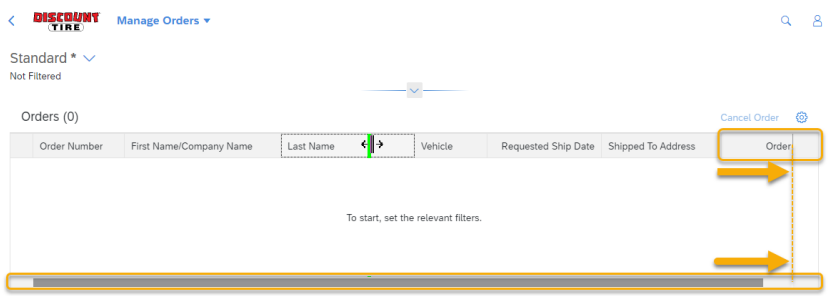
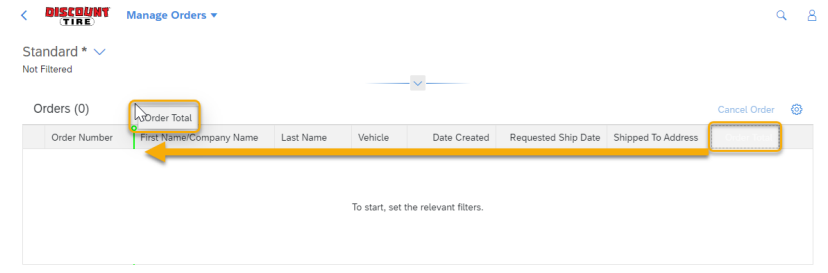
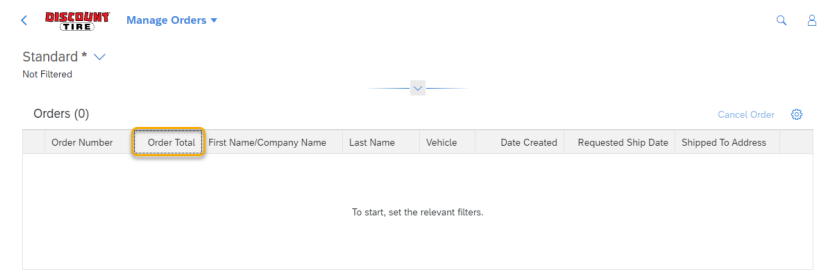
Customizing Settings

4	Use the horizontal scroll bar at the bottom of the screen to move the customized column filters into view. 
5	Hover the mouse over the column dividing lines to show a green highlight line and the horizontal resize cursor tool. Click and hold to drag the green highlight line to the left or right to shorten or widen the column size of the filter column.
6	Click and hold to drag the column. The green highlight line follows along to the column space in any order you place the new column location. 
7	Release the mouse click to drop the column in the new location. 

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