Vendor Schedule App

Quick Start Guide

BTS Group



Updated 9-04-2018

Table of Contents

SUPPORT AND CONTACT **3**
WEBSITE OVERVIEW **3**
ACCESSING THE WEBSITE **3**
REGION SWITCHING **4**
REFRESHING DATA **5**
SAVE AND RESET VIEW **6**
REARRANGING, HIDING AND RESTORING COLUMNS **7-8**
SORTING COLUMN DATA **9**
FILTERING COLUMN DATA **10-12**
EXPORT TO CSV AND EXCEL **13**

Support and Contact

For questions, bug reporting, and upgrade requests, please contact the BTS group at support@mainvuehomes.com or by submitting an IT ticket at http://support.mainvuehomes.com

Website Overview

The vendor schedule app was created to provide instant access to scheduling on various devices.

Accessing the Website

URL: https://webapps.mainvuehomes.com/schedule

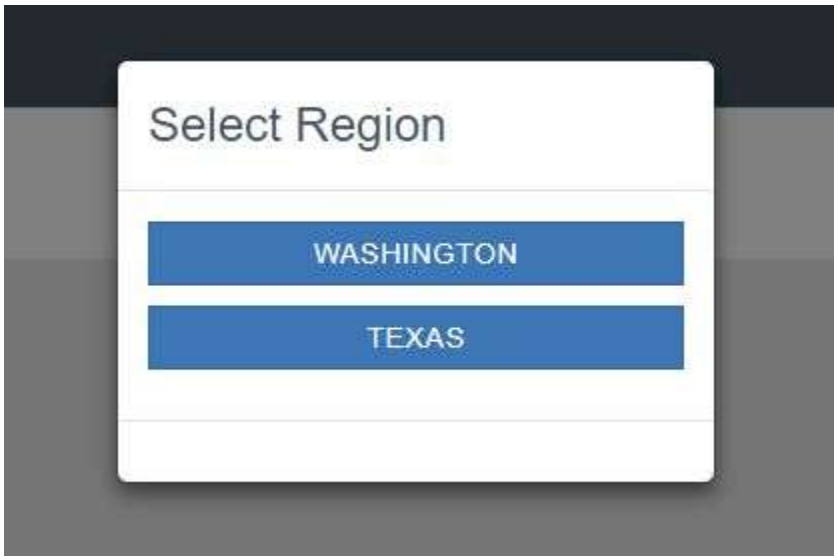
BROWSER REQUIREMENTS: Chrome, Edge, IE 11+, Edge or any modern browser.

LOGIN: None

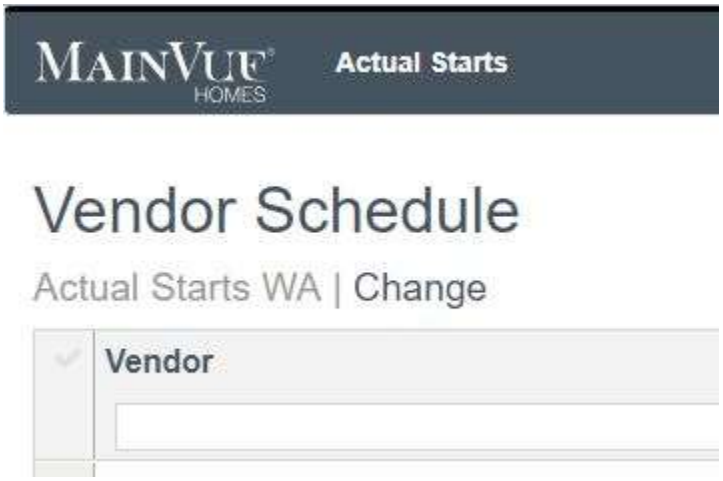
ACCESS ROLES: None

Region Switching

When you first browse the app you will be prompted to select a region. Selections are saved on your device as the default region.



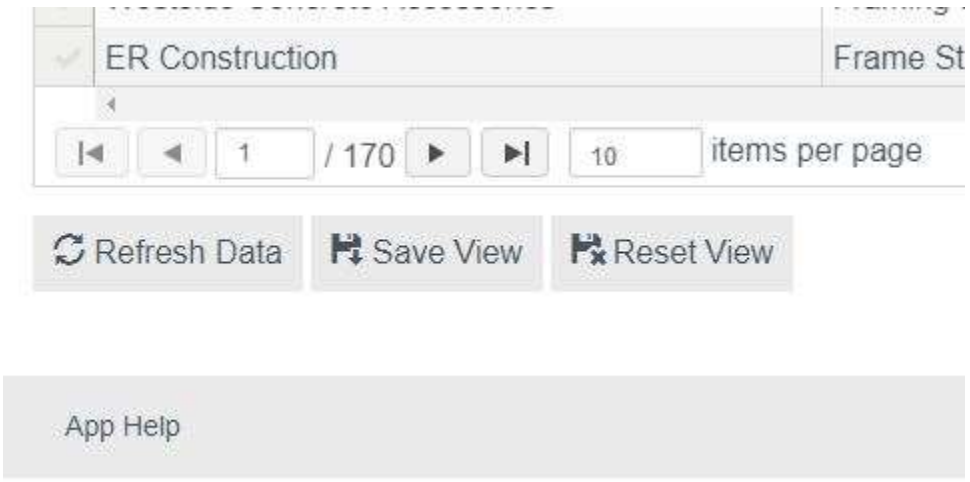
To **switch regions**, click the 'Change' link at the top left next to 'Actual Starts *.' Your selection will be saved as the new default region.



Refreshing Data

On load the app grabs the latest scheduling data. However, you may want to refresh the data from time to time as you are using it to get the latest updates.

To **refresh scheduling data**, click the 'Refresh Data' button at the bottom left of the grid.



Save and Reset View

In the app you can **customize your 'view'** by rearranging/hiding columns, sorting and filtering. (see below)

Save View

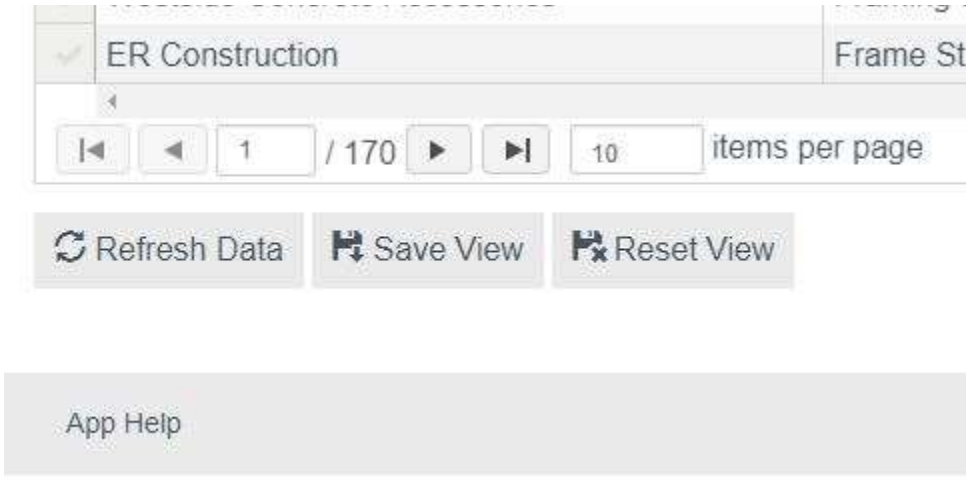
Once you have created your custom view you can save it by clicking the 'Save View' button at the bottom of the grid. Your custom view will persist and appear the next time you use the app.

The following custom settings are saved:

- Column widths
- Column order
- Visible/Hidden columns
- Sorting
- Filters

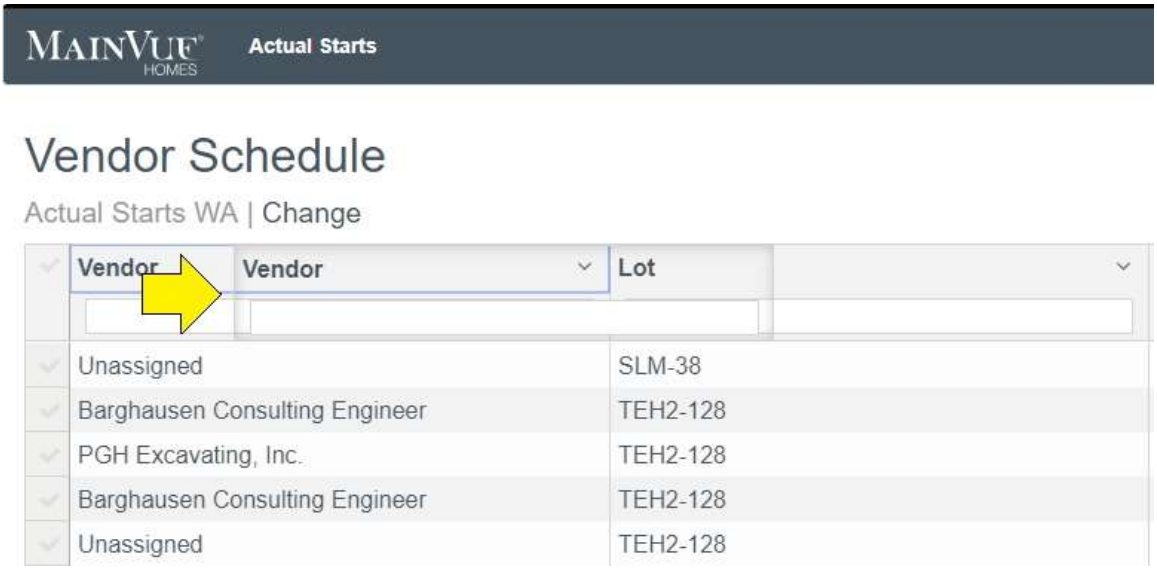
Delete View

To **delete a custom view** and restore the default grid, click 'Reset View' at the bottom of the grid.



Rearranging, Hiding and Restoring Columns

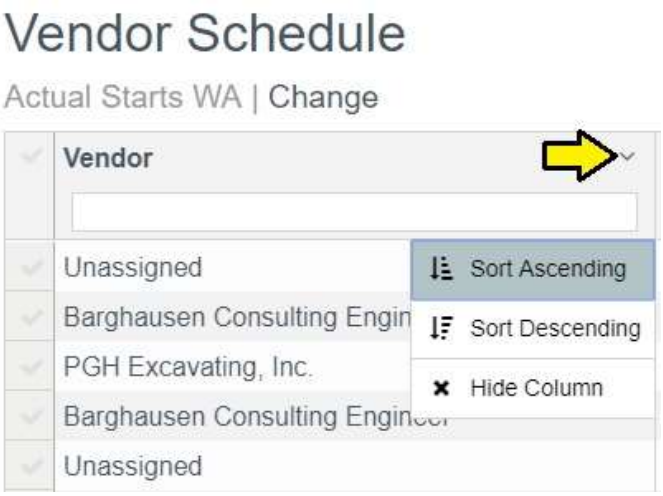
To **rearrange columns**, click and drag a column heading.



To **change a column's width**, click the line that separates column headings and drag. As you hover over the line you will see the mouse pointer change to indicate dragging.

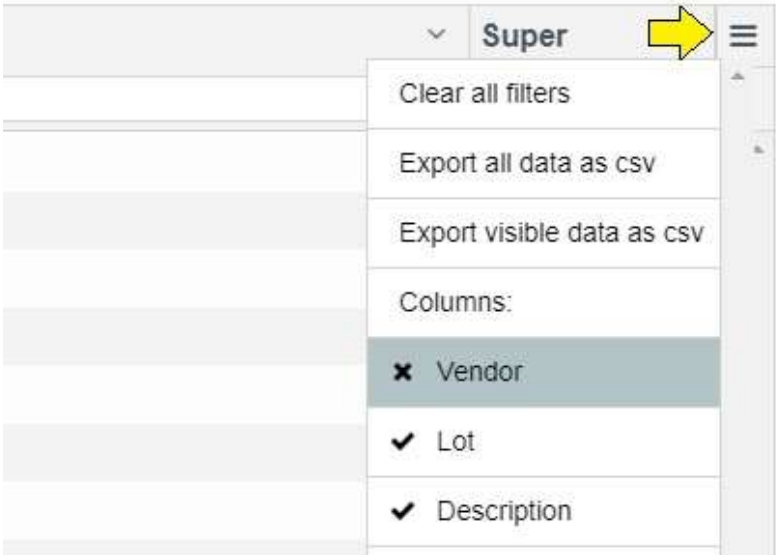


To **hide a column** from view, click the down arrow on the top right of the column and a menu will appear with the option ‘hide column.’ Click the option and the column will hide from view.



NOTE: You can also hide/restore columns by clicking the ‘hamburger’ menu at the top right of the grid.

To **restore a column**, click the ‘hamburger’ icon in the upper-right corner of the grid and a menu will appear with all the available columns listed. Click the hidden column in the menu and it will reappear in the grid.



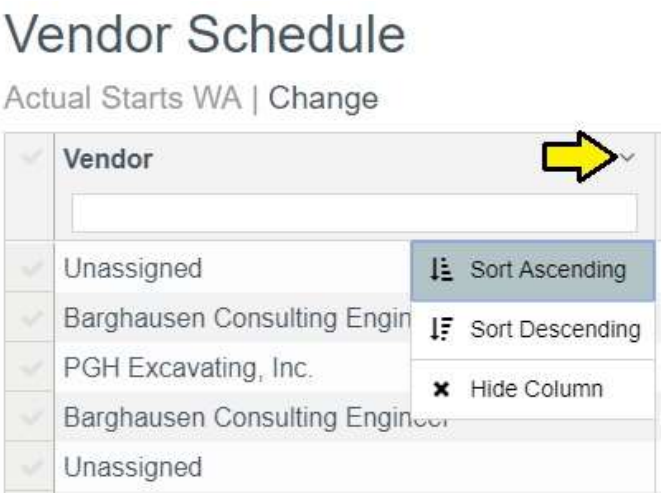
You can also **restore all columns** by clicking the ‘Reset View’ button at the bottom of the grid.

Sorting Column Data

Sort a column by clicking the column header. There are three sorting states:

1. Sort ascending (arrow points up)
2. Sort descending (arrow points down)
3. No sort (no arrow)

Columns are not sorted by default. You can also set sorting by clicking the menu at the top right of every column.

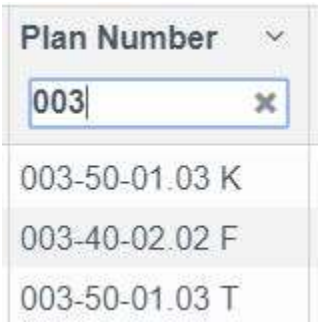


Filtering Column Data

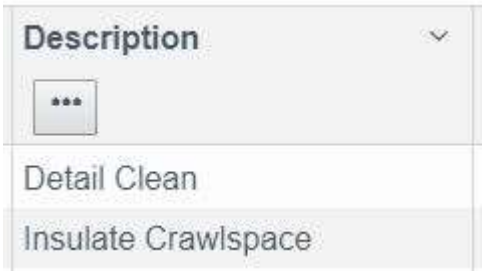
Filters can be added to columns to narrow results. Filters are cumulative meaning you can apply filters to multiple columns and they work together.

There are two types of filters: *text input* and *multiselect*. A column will have only one of these.

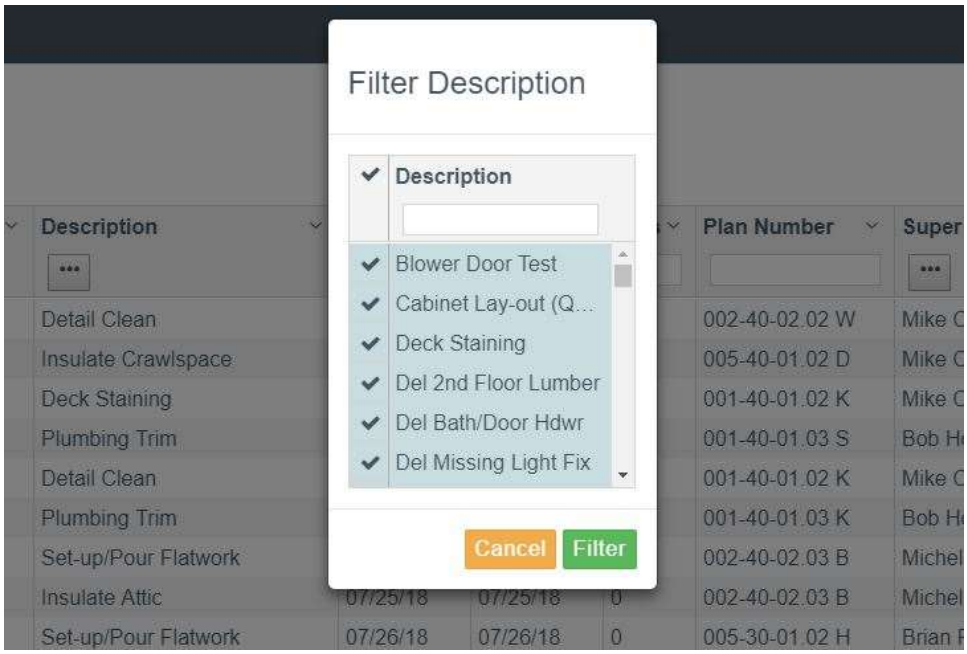
To **apply a text input filter** on a column, click the text input box below a column heading. As you begin typing the column will filter in real time. Click the 'x' to the right of the search term to remove the filter.



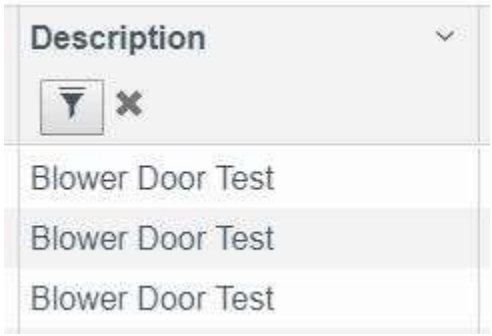
To **apply a multiselect filter** on a column, click the horizontal option button below a column heading.



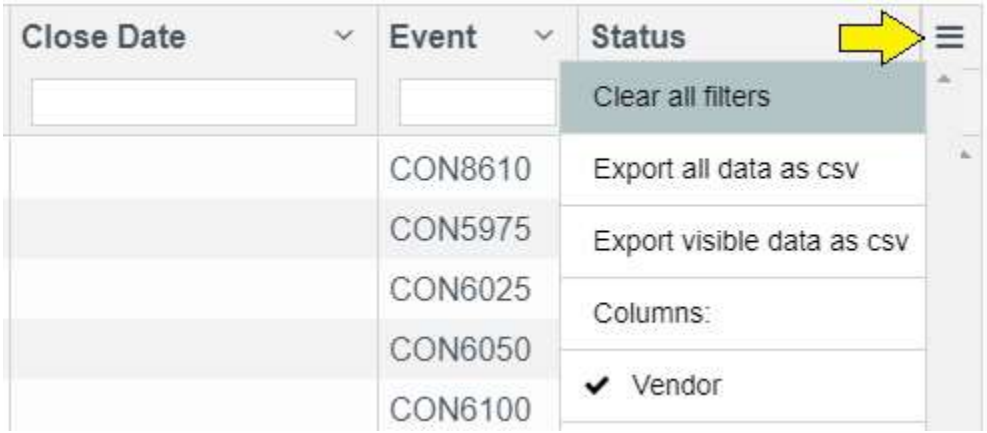
A filter modal window will launch with all possible filter terms for that column selected.



- Click the topmost checkmark next to the column name to toggle '**select all.**'
- To **select or deselect a single filter term** click the checkbox next to the term.
- To **search filter terms in the filter modal window**
    1. Click in the search box under the column name
    2. Type your search term and select which filter terms you would like to add from the list
    3. Click 'Filter'
- Filtered columns are indicated with a filter icon in the option button. Click the 'remove' icon to the right of the button to **remove all filters on that column.**



To **remove all filters globally**, click the 'hamburger' menu icon at the top right of the grid and select 'clear all filters.'



Exporting to CSV and Excel

The app can export data to a CSV (comma separated values) or XLSX file, for viewing in Excel.

Exported files will include a date stamp in the file name for reference i.e. ‘vendorschedule01-01-2018.xlsx’.

The export function can be found by clicking the ‘hamburger’ menu at the top right of the grid.

There are 3 file export options for both CSV and XLSX:

1. Export **all** data
2. Export **visible** data
3. Export **selected** data (only appears when a selection is made)

To **export data with filters applied**

1. Apply filters to grid
2. Select a page size that is larger than the number of total items
3. Select ‘Export visible data as …’

Exported CSV/XLSX files will appear as downloads in your browser. If you have Excel installed, clicking the download should launch Excel.

