

Setting Up and Using Lists

Reporting and stock maintenance are tedious tasks if you have a large inventory. Lists let you group your inventory based on their categories.

You can use these lists for various purposes across various screens.

In this course, we will show you how to set up lists and their usage across different screens. We will also show you how to maintain lists.

Objectives

- Setting Up Lists
- Using Lists
- Maintaining Lists

Setting Up Lists

Group your products into *lists* to organize your inventory.

Lists provide easy access to items across screens like *Physical Inventory*, *Product Maintenance*, and *Purchase Order Detail*.

From the main menu, select **Products** and then **Setup**.

Select **Lists**.

Click **Add**.

Give the list a unique name.

You can name the list based on the items in the list or their usage.

For example, the list named Christmas could contain seasonal items like light strands, outdoor holiday decor, or weatherproof extension cords.

Select a list type from the drop-down menu.

The **List Type** determines where you can *access this specific list*.

For example, you can use a Physical Inventory list on the Physical Inventory screen.

Choose a store to assign.

You can assign a list to either one store or all stores.

If you select **Tag** in the **List Type** drop-down menu, the tag toggle displays.

This toggle lets you decide if the list tag is *general* or *store specific*.

A general list tag applies to all stores. Store list tags apply to specific stores.

For example, you can have an *all-stores* list that would include weatherproof extension cords. But you may have a Holiday list for stores in Michigan and stores in Florida. The Michigan list would include snow shovels, but the Florida list would not.

Select the applicable stores if you choose *store tags*.

Click **Save** when you're done.

Next, add items to the list in the **Items** section.

Use the Search bar to add a single item or use the **Add** button to choose multiple items.

If your **List Type** is *Order*, enter an order quantity as you add items to the list.

Use the **Quick Add Product** link to add a new item to *Products* and append it to the list.

Using Lists

You can use *Lists* to group products and use those lists for various purposes.

For example, you can use lists as a filter when searching for items on the following screens: Products Maintenance, Physical Inventory, PO Detail, and POS Advanced Search.

In Product Maintenance, select the **Lists** drop-down filter.

Choose the List and select **Search**.

Propello displays the products in this list.

Note that all list types except **Tag** are available under **Lists**.

Tags are available in the **Item Tags** drop-down.

You can also use the *List filter* on the Physical Inventory page to view all the items from the list and add any of the items you want to the physical inventory, if necessary.

The **Lists** filter on the *Purchase Orders Detail* page allows you to narrow the selection of products to add to the purchase order.

You can access the **Lists** filters in the **POS Advanced Search page** by selecting the items from a list and adding them to your sales order.

Maintaining Lists

Maintain lists easily using the **Edit**, **Copy**, and **Export to Excel** buttons in the **Lists** screen.

Select the list using the checkbox and click **Edit** to modify it.

Note that you cannot change the list name, list type, and the assigned store.

Add more items to the list in the **Items** section.

The **Edit List** screen contains **Export to Excel**, **Delete**, and **Print Labels** buttons that control the items in the grid.

The **Export to Excel** button lets you export the selected rows' details into an Excel spreadsheet.

Use the **Delete** button to remove the items from the list.

Select one or more items and use the **Print Labels** button to print labels for the items.

You can copy a list using the **Copy** button.

Give the list a name in the **Copy List** pop-up. Choose **Save** to save the list or select **Save and Edit** to save and edit the list in the **Edit List** screen.

Export the table details using the **Export to Excel** button.

To delete a list, enable the list checkbox and click **Actions**. Now select **Delete List**.

You can also delete a list in the **Edit List** screen.

Recap

As you can see, using categories and lists helps remove the tedium of reporting and stock maintenance.

In this course, we showed you how to set up, maintain, and use lists.

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