adminsoft

Adminsoft Accounts User Guide

SALES ORDER PROCESSING

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Adminsoft Accounts Guide – Sales Order Processing

INTRODUCTION

Like Sales Prospecting, this module is not available when the accounts system is running in Basic mode.

This module handles all sales orders/jobs, and works hand in hand with Sales Prospecting. Orders/jobs can be created directly from a sales prospect record, or from an estimate. An order/job doesn't actually need to be associated with a prospect or an estimate, and so can also be created directly from the customer account details in the A/c Receivable Ledger (Sales Ledger). An order/job must be associated with a customer account.

Orders/jobs are referred to in this way because different businesses call them different things. But most businesses will refer to them as an 'order' or as a 'job', and so in Adminsoft Accounts they're referred to as 'orders/jobs'. Mostly, in some places where space is tight, they may just be referred to as 'order', or 'job' if space is particularly tight. But the terms are interchangeable, they mean the same thing.

Sales Order Processing allows you to create an order/job (if created from an estimate it will use the estimate details), raise any Purchase Orders that may be necessary, raise any Sales Invoices, print Delivery Notes, and allow you to record the quantities delivered to the customer. If the items being delivered are stock items, it will also maintain stock levels. You can operate an order/job that just contains service items, or a mix of service and goods. An order/job can be edited at any time, and items can be added to it. So, it's flexible, and could be used to monitor a process that may take weeks or even months. There are limits, of course. It would be impractical to use it as the basis for controlling the costs involved in the construction of a building, for example. There would be just too many items, it would be far too complex. This module was designed to handle business processes that involve the purchase of one or more items which are then supplied to the customer, perhaps not all at once. Sometimes a customer may want the delivery to take place in stages, and the Sales Order Processing module could handle that. It can also handle other things. For example, if your business is putting up fences, then an order/job could be created that would include fence panels, posts, concrete, maybe plinths on the costs side, and on the charge to customer side might simply say X feet or yards of fencing erected. As the customer may not require a breakdown of the job item by item, they just want some fencing put up.

Sales Invoices can be created directly from a sales order/job. The invoice automatically gets posted into the customer's account. Any Purchase Orders raised from a sales order/job go into the Purchase Order Processing system. Also, any orders/jobs can be listed in the customer's account details. So, Sales Order Processing is fully integrated with the other modules.

This guide will assume you have already read the guide on using Sales Prospecting. In which case, you'll be aware there are two types of estimate in Sales Prospecting: single product/quantity and multiple product/quantity. A sales order/job can be created from either, but there is only one type of order/job. Regardless of the estimate used.

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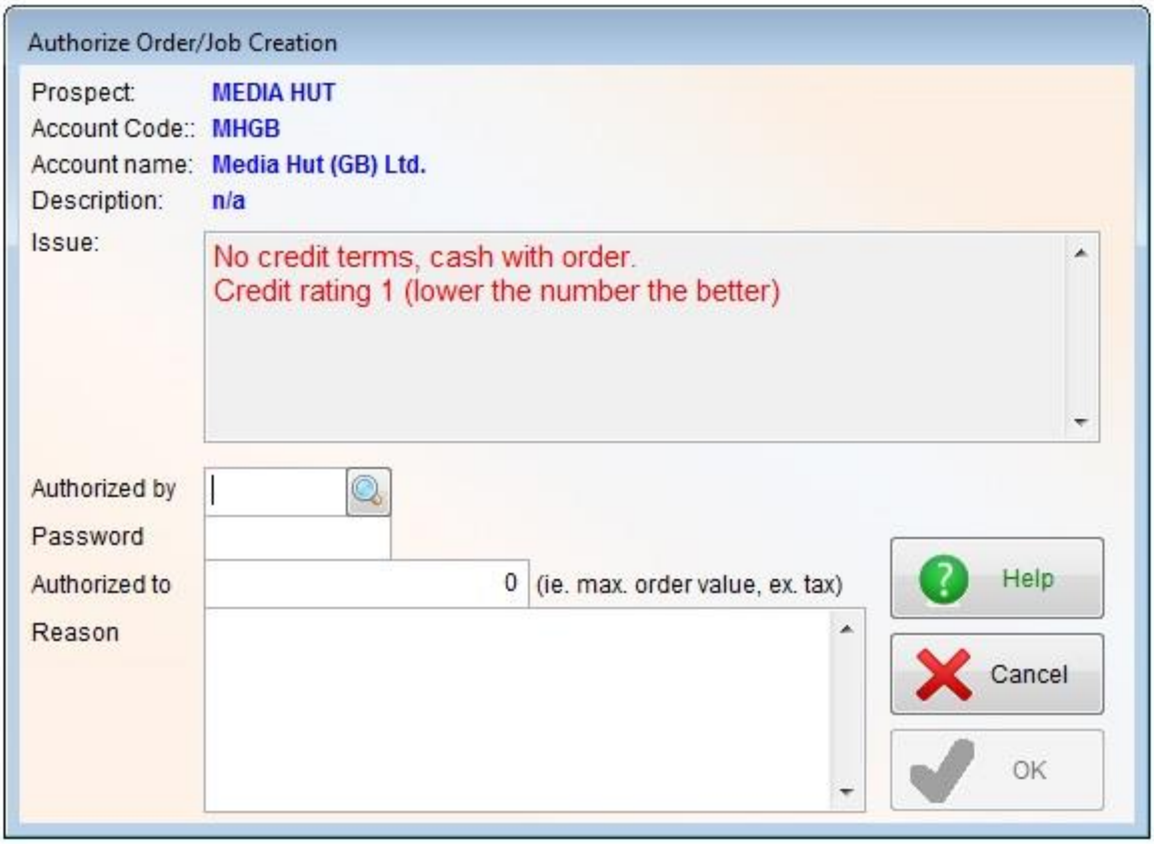
CREATING AN ORDER/JOB

If an order/job is created from a prospect record or customer account record, the details in the new order/job will be minimal. If it's created from an existing estimate, it will inherit the details in the estimate – in which case, most, perhaps nearly all the work is already done. In the screen image below, I clicked the 'New Order; button, and this appeared:

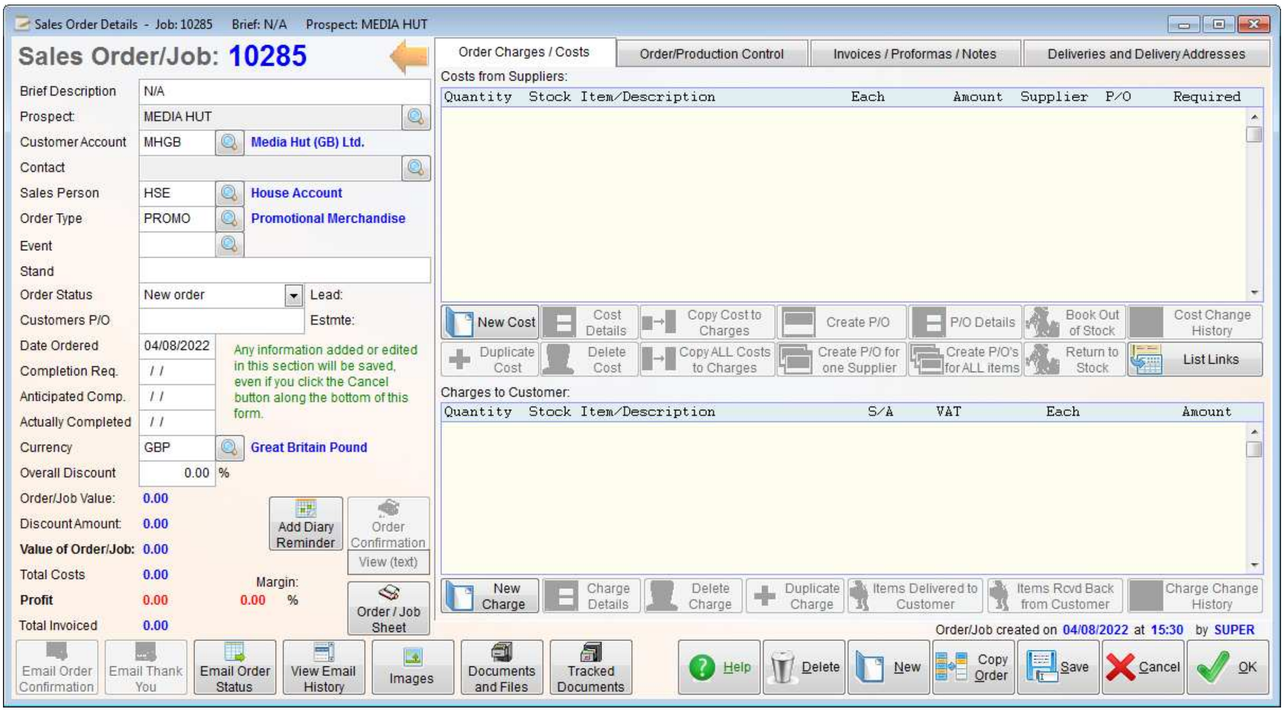


The reason for the window above is the customer account that's linked to the prospect record does not have credit clearance. In this case, the account has no credit terms setup, it's a cash account. The 'Credit rating' is good, but only because it's a cash account, so invoices have always been paid on time, they've probably been paid upfront (ie. before they were even raised). So, the credit rating is good, but as they don't have credit terms, their credit status has been flagged as an issue. To get past this, either the account needs to be given credit terms, or someone needs to authorize the order/job. Who can provide this authorization is setup in the Adminsoft Accounts users Security Profile. If the user logged in can provide clearance, this window will still appear. This is so they can provide a reason for authorizing the order/job.

Whether authorization is required for any orders/jobs can be specified in the 'Settings' option in the Sales Prospecting and Processing setup menu. In there, click the 'General 1' tab, and near the bottom is an input selection '**Require authorization for new order**'. The options are 'Never' (which is the default, so unless you've changed this, you're unlikely to see the above authorization window), 'If issues with credit', 'If customer account stopped', and 'Always'.

If an authorization window appears, an order/job cannot be raised until a valid user ID and password have been entered, and a reason for the authorization provided.

Anyway, when a new order/job appears on screen, it will look like this:



From this option you can handle all aspects of an order/job. If the order/job has been created form an estimate, the estimate details will be used as the basis for the order/job, including all the costs from suppliers and charges to customer.

The option is really broken down into five different sections. There is the section on the left hand side, which presents the basic details of the order/job. This includes the '**Order Status**'. When an order/job is first created, whether from an estimate or directly from the prospect details or customer account, the status will be set to '**New**'. Once you start doing any work on the order/job, we recommend you set the '**Order Status**' to '**Production**'. Some events, such as raising a Purchase Order can automatically change the status of the order/job. Maintaining the status of an order/job is important, because it provides a useful indicator of the position of a job at a glance.

For an order/job to proceed, it must be linked to a customer account. Usually, it will use an account that is linked to the prospect record, but it is possible to change the prospect for an order/job. The new prospect record may not have a customer account linked to it. If there is no customer account, no Purchase Orders can be raised. Though any existing Purchase Orders are not affected. We recommend extreme caution if the order/job is to be effectively transferred from one prospect to another.

The left hand section can be minimised in order to reduce the amount of space the order/job is taking on screen. Simply click the left hand arrow (to the right of the order/job number). To maximise the left hand side information section, click the right hand arrow that will be sat just below the '**Cost Change History**' button (it only becomes visible is the left hand arrow is clicked).

The buttons along the bottom of the order/job window are as follows:

'**Add Diary Reminder**' allows you to enter a reminder into your diary, perhaps to contact the customer, or chase up a supplier, etc.

'**Order Confirmation**' will output an Order Confirmation. This is provided mainly to allow the Order Confirmation to be printed or output into a different application, such as Microsoft Word. For the most part, we would anticipate Order Confirmations being sent by email using the '**Send Order Confirmation**' button.

'**Order/Job Sheet**' outputs details of the order/job to a printer, PDF file, or into another application. This is for internal staff use, and it is not intended to be sent to the customer. It does include cost details. When you click this button, the details first appear on screen, allow you to then redirect if/as necessary.

'**Email Order Confirmation**' will output an Order Confirmation as HTML, into the body of an email. You can edit the email, perhaps adding a personal message, before sending it.

'**Email Thank You**' will create an email thanking the customer for their business. The email is based on a standard HTML layout (user defined). The button is only available when the status of an Order/Job is set to 'All Delivered'. Until then, it's greyed out. It will not be available if the status is set to 'Completed'

'**Email Order Status**' will create an email showing the status of the order/job, possibly including things like events and any deliveries made. The exact detail provided depends on the layout of the Order Status, which can be edited, and being HTML is quite versatile. The idea of this option is to have something you can present to your customer to reassure them their order/job is progressing. Obviously, whether you use it or not is optional.

'**Email History**' will display a list all emails sent out in respect of this order/job.

'**Images**' allows you to add any images to the order/job that may be required to carry out the work. It also allows documents to be scanned in. The images in here are not reproduced in any documents such as the Order Confirmation or Order Status.

'**Documents and Files**' allows you to add any kind of file to the order/job. This may include technical specifications, any files the customer or supplier has sent, etc.

'**Tracked Documents**' allows you to add a document to the order/job, and then track any changes that are made to it. It doesn't record *what* changed, but records when and who made the change, and keeps a new copy of the document each time.

'**Delete**' will allow you to delete the order/job. If any Purchase Orders have been created, this button will be greyed out.

'**New**' will create a new order/job, using the details of the current order. It does NOT include the costs from suppliers or charges to customer.

'**Copy Order**' will create a new order/job, using the details of the current order, INCLUDING the costs from suppliers and charges to customer. . Useful when a customer wants to re-order.

'**Save**' will save the details on the left hand side of the window, and allow you to continue to work on the order/job.

'**Cancel**' will exit the order/job, and any changes made to the details on the left hand side of the window will be lost. With the exception of '**Overall Discount**', any value entered into that input field is saved right away. Any changes made above in one of the other sections, such as '**Order Charges / Costs**' will not be affected, as any additions or changes are saved as soon as they are made.

'**OK**' will save everything and then exit the order/job.

Input Fields

Most of the input fields down the left hand side are self explanatory. In the screen image a couple of pages back, the field '**Event**' is a user defined coded field. It says '**Event**' in this example, but you can change the description to anything you wish in Settings. The input field '**Stand**' is also user definable, but not coded. Anything can be entered into this field. It too can be changed to any prompt you wish.

The '**Currency**' input field always defaults to the currency given in the prospect record, the customer account record, or the estimate, which ever place the order/job was created from. Costs will always in the ledger currency. If you change the currency, the charges to customer will not change to reflect a new currency. So for example, if we had an item selling at $100.00 and changed the currency to Great British Pounds, it would then be £100.00. **NOTE: when raising a sales invoice or proforma invoice, it will be in the currency as specified in the customers account. So, be very careful when dealing with multiple currencies.**

The '**Overall Discount**' input field will default to whatever is in the prospect record, estimate, or the customer account, depending on where the order/job was generated. This, as the name suggests, provides an overall discount to the order/job. It does not change the individual charge items, the discount is knocked off the order/job total. When a sales invoice or proforma invoice is raised, the overall discount on the order/job will be applied, regardless of any discount setting in the customers account. It's worth noting, this discount field can be changed part way through handling an order/job. It won't affect any sales invoices or proforma invoices already raised, but any future invoices raised from the order/job will carry the new discount.

Before getting into the next sections, we need to mention the various lists. Most sections have two or more lists, often one above the other. If the order/job window is dragged higher, the lists will also grow in height, each list by an equal amount. If one list contains more lines than the other, you may want that to be higher than the other list. So, you can click the header in the list (ie. the column labels just above the data being listed), a small red block should appear in the righthand side of the header. This indicates the list has been given priority. Now, when the window is dragged higher, the list without priority will not change its height, whereas the list with priority will increase in height, taking full advantage of the increase in height of the window. Click the list header again to remove the priority.

Order Charges / Costs

In this section, as you can see, you can maintain the costs that are expected to be incurred from suppliers, and the charges anticipated to be made to the customer. While the order/job is active (ie. the status is not '**Completed**' or '**Cancelled**' any of the charges can be changed/added/deleted at any time. The costs can always be changed regardless of order/job status. This is because quite often, costs can change, or new costs come to light, well after an order/job has been delivered to client, invoiced and paid for.

The function of most of the buttons in this section are obvious. But some may require a little explanation:

Costs from Suppliers

'**Create P/O**' will create a Purchase Order for the selected cost item. If the item already has ab open P/O, or some items have already been delivered, the P/O will automatically be for the balance remaining. The P/O can be edited.

'**Create P/O for one Supplier**' will create a P/O for the supplier of the selected item. All items in the order/job to be purchased from that one supplier will be added to the P/O. Quantities will be adjusted, depending on any existing P/Os and any items already delivered.

'**Create P/O's for ALL items**' will create one or more P/O's for every cost item in the order/job. Quantities will be adjusted, depending on any existing P/Os and any items already delivered. If there are a lot of cost items, you could end up with quite a few P/O's appearing the screen at the same time. So, this option is perhaps best avoided where there are lots of costs from lots of different suppliers.

'**Duplicate Cost**' will duplicate the selected cost, but without the P/O or items received details. The item created will be a new item.

'**Copy Cost to Charges**' will copy the selected cost to the '**Charges to Customer**' list. You will, of course, need to edit the charge amount.

'**Copy ALL Costs to Charges**' will do exactly that. However, be aware this option will add to whatever charges are already there. Even if it's obvious that a cost item is exactly the same as an existing charge item, it will still be added.

'**Cost Change History**' will display a list of changes to the currently selected cost item.

'**List Links**' as in estimates, will display a list of the costs, and any charge items they are linked to. If you use one of the '**Copy…**' buttons, the charges created will be automatically linked to the costs they were created from. If costs and charges are linked, delivery notes can be created from the costs section, and be registered in the charges section, and vice versa. This also means when raising a delivery note from the charges section, it can record the cost of the items delivered, and take them out of stock (if they're stock items). Without the link into costs, that would not be possible. In some businesses, this may not be possible anyway, as what goes into the charges section may bear little resemblance to what goes into the costs section. So, the use of links is optional.

Charges to Customer

'**Order Delivered to Customer**' will open up a window that will display all the items expected to be delivered, you can then remove items and edit quantities as required. A Delivery Note can be printed off from this option. If any of the items are stock items, the stock levels will be adjusted.

'**Items Rcvd Back from Customer**' will open up a window that will display all the items the customer has received, and allow you to edit the quantities of those that have been returned as required. If any of the items are stock items, the stock levels will be adjusted.

'**Charge Change History**' will display a list of changes to the currently selected charge item.

The order/job window can be dragged wider. If it is, it will reveal details of the numbers of items in stock, on order and received/delivered.

Order/Production Control

'**Production Tasks to be Done**' lists all the task that are still required to be completed. When an order/job is created, some tasks can be generated automatically. They can set up in Setup -> Sales Prospecting and Processing -> Order/Job Type Codes, the tasks that are generated will depend on the order/job type. Tasks can be added manually using the '**Add Task**' button. If you know a task will never be done/completed, you can select it and click the '**Not Done**' button.

'**Production Events and Tasks Completed**' as the name suggests, lists all the tasks that are now done. However, it can also list things/events that have been done but were not scheduled or expected. Click the '**Add Note**' button to describe the event.

'**Purchase Orders**' lists all the Purchase Orders, regardless of status. The status of each P/O is displayed. You can view the details of a P/O. If there are items outstanding, it will allow you to receive those items.

Invoices / Proformas / Notes

This lists all Sales Invoices and Proformas created for the order/job. There is no practical limit to the number of invoices or proformas that can be created.

You can also enter some general notes about the order/job in this section. These notes are for internal use only, and are not output anywhere, except in the Order/Job Sheet (also for internal use only). Buttons in this section:

'**New Proforma**' allows you to create a Proforma Invoice. If you have authority to create customer transactions, the invoice will appear on screen, allowing you to edit it if necessary, and print and post it to the customer account. If you do not have the authority to create customer transactions, a Proforma Invoice will be created and automatically saved to the customer account for someone else to work on. If set up to do so, an email will be sent to notify someone, or some department, that a Proforma Invoice requires completing (you will not get to see this email, it's sent in the background).

'**New Invoice for ALL Goods Ordered**' works in a similar way to '**New Proforma**'. It raises an invoice for all items in the '**Charges to Customer**' section, regardless of whether they are marked as delivered or not. You would normally only use this option if there is only going to be one invoice for the order/job. If you have authority to create customer transactions, the invoice will appear on screen, allowing you to edit it if necessary.

‘**New Invoice for Goods Delivered Only**‘ works in a similar way to '**New Proforma**'. It raises an invoice for all items in the ‘**Charges to Customer**‘ section, but based on what has been delivered. You can create as many invoices as necessary using this option, as items are delivered. You would use this option where items are being delivered in batches, rather than all at the same time. Or, perhaps where the quantities delivered differ from the quantities the customer ordered. If you have authority to create customer transactions, the invoice will appear on screen, allowing you to edit it if necessary.

Delivery Addresses

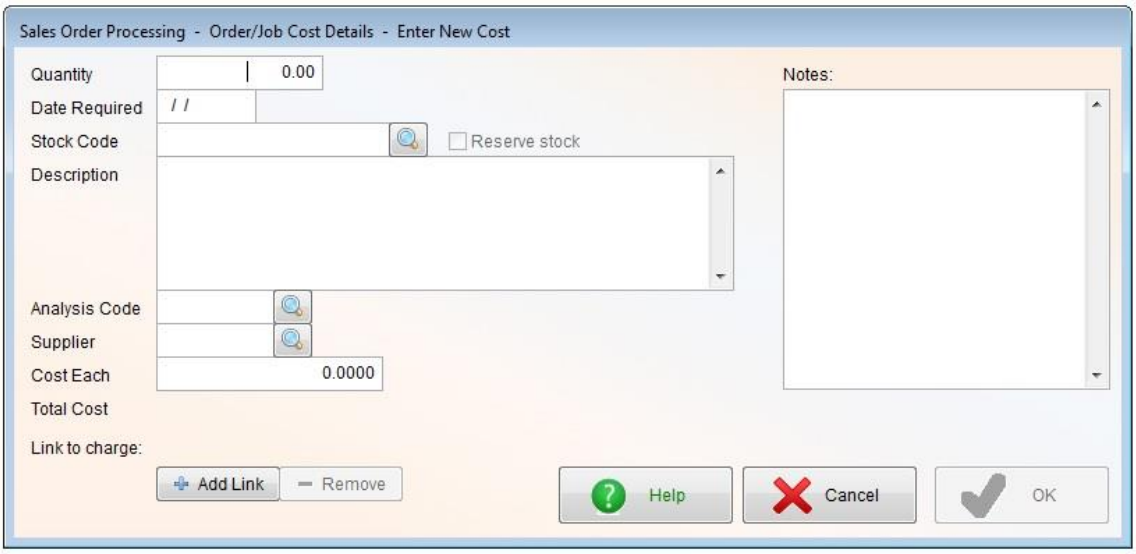
'**Deliveries to Customer**' will list all the deliveries (including any returns) that have been recorded going to the customer. Deliveries are based on the items listed under '**Charges to Customer**'.

'**Delivery Addresses**' are the customers required delivery addresses. These can be used when entering the details of a delivery to the customer (the '**Order Delivered to Customer**' button in the ‘**Order Charges / Costs**‘ section).

Setting up an Order/Job

Although this section and ‘**Charges to Customer**‘ talk about ‘items’, it could equally apply to services. The quantity could be time, or simply 1 where the service provide is quite specific.

So, usually the first thing to do is to enter the costs. In the ‘**Costs from Suppliers**‘ section, click the ‘**New Cost**‘ button. The following window will appear:



‘**Quantity**‘ is of course the required number of items. The format of this number is fixed, and will always be to 2 decimal places.

‘**Date required**‘ is the date the items are required. This is not necessarily the date the customer requires them. It’s the date YOU need to take delivery.

‘**Stock Code**‘ is the SKU of the item if it’s a stock item. If it’s a stock item, some of the other input fields below this one will be filled in automatically from the stock item details. This input field is optional, if it's none a stock item, just ignore it.

'**Description**' is a description of the item. This can be over multiple lines, and it will appear in the order/jobs details and documents such as an Order Confirmation over several lines if that is what is entered. Note: any empty lines will be ignored.

'**Analysis Code**' refers to the Purchase Analysis code. This input is optional, but strongly recommended.

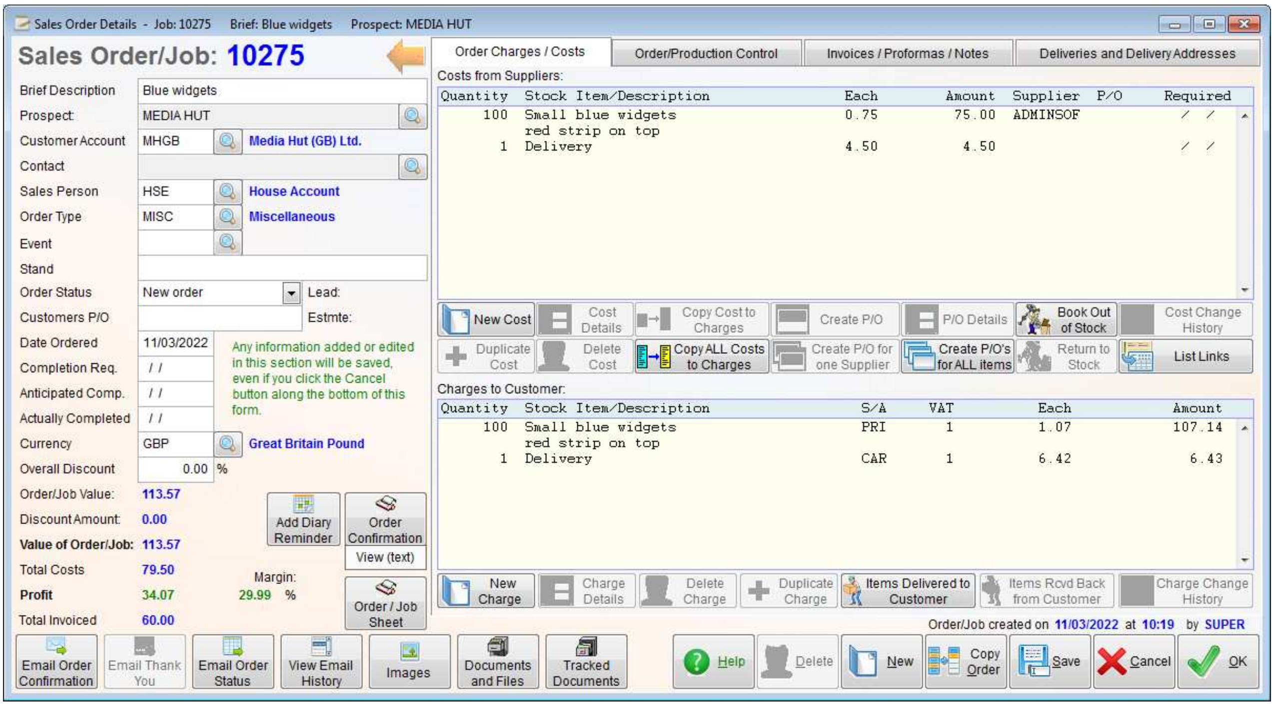
'**Supplier**' is the account code of the supplier of this item. This is used if a Purchase Order needs to be raised. This input field is optional.

'**Cost Each**' is the unit cost of an item, to four decimal places. So, you can cost items down to 100th of a penny/cent. Note: there is no 'cost per' option. The cost is always per 1 item.
'**Notes**' allows you enter any notes you wish regarding the item. These notes do not appear in any documents that are likely to be sent to the customer. They are for internal use only.

'**Add Link**' allows you to select and existing charge to link to the cost item you're creating. If no corresponding charge item yet exists, you can skip this and come back to it later (using the '**Cost Details**' or '**List Links**' buttons). Adding links between costs and charges is optional.

After entering costs, you might want to enter the '**Charges to Customer**' next. The process is very similar to above. Except there is no '**Supplier**' input field, instead, there is an input field asking for the Sales Tax/VAT code. This code will be used when raising a sales invoice. There is the opportunity to edit the sales invoice before it's posted. So, if there's an error made here, there's an opportunity to correct it later on. Although, costs and charges can be edited at any time (up until the order/job is completed in the cash of charges).

In the next screen image, you can see I've now entered some basic costs and charges:



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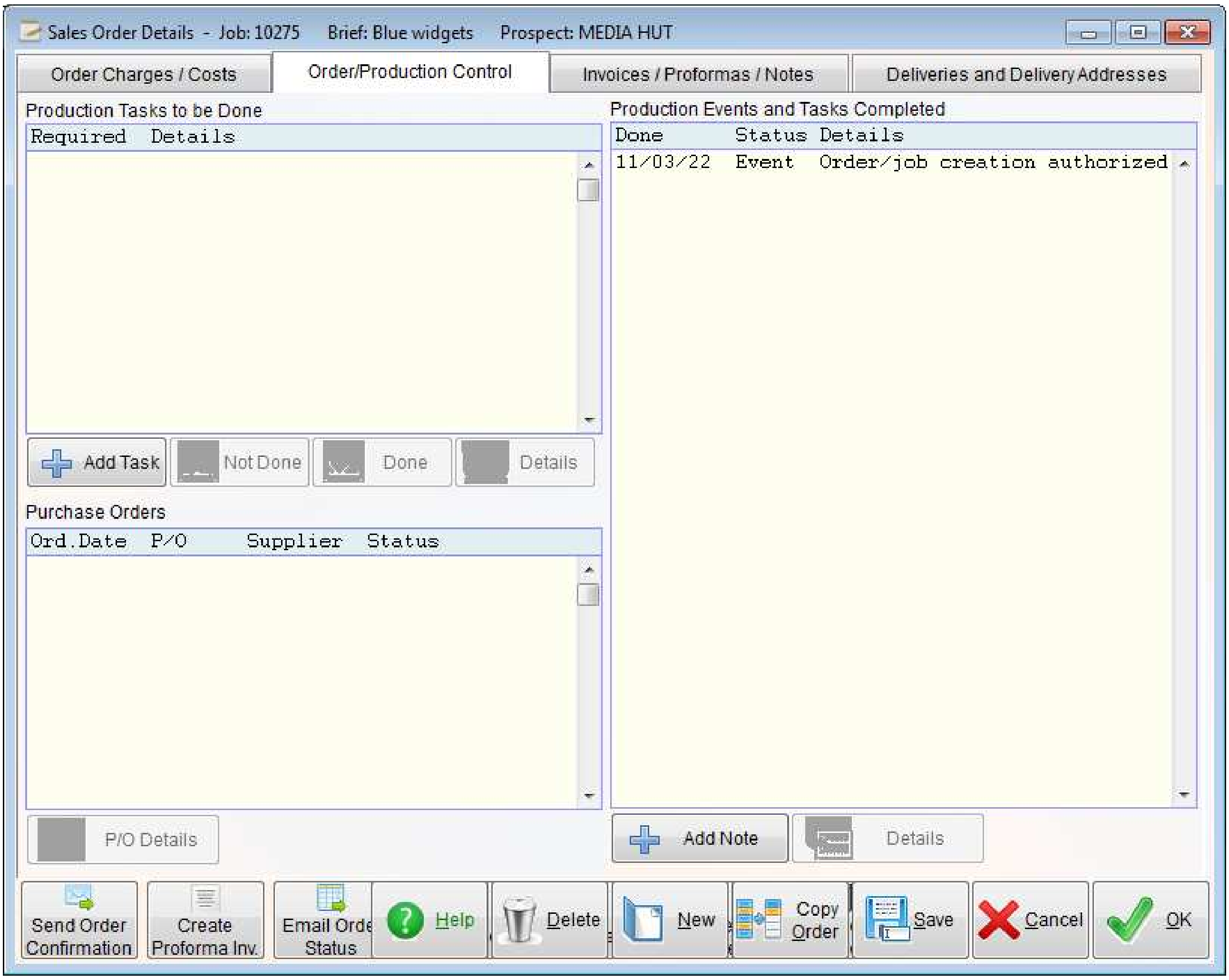
This order/job is now done, in so far as setting it up is concerned. Some orders/jobs may require you to raise one or more Purchase Orders, and these are covered a few pages back. Some orders/jobs are a little more complicated than just ordering an item, and then when it arrives, forwarding it to the customer. An order/job can have 'tasks'. These are things that need to be done in order to complete the order. For example, if you're a printer, you're going to require some artwork, you may need to send a proof to the customer, and then the customer needs to accept the proof. You can add tasks manually to an order/job, you can also setup tasks based on '**Order Type**'. So, which tasks appear will depend on what the '**Order Type**' is set to. To see what tasks there are, and/or to work on them, click the '**Order/Production Control**' tab at the top of the order/job window. It looks like this (note, I've hidden the information on the left hand side of the order/job in order for you to see the window more clearly):



In the example above, no task have been added, except the event of the order/job being created. Any tasks not done would appear in the left hand list. When a task is complete, you would click on it, and then click the '**Done**' button. It would then appear in the right hand list as being done. If a task is not likely to be done for any reason, you can select it and click the '**Not Done**' button. It will then get listed in the right hand list, with a '**Status**' of 'Not done'.

If something has been done to the order/job that is not listed as a task, the event can be recorded by clicking the '**Add Note**' button below the right hand list.

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HOW DO YOU WANT A SALES ORDER TO WORK?

The big problem with something like Sales Order Processing is that each business can have very different requirements. Different businesses do different things, they're selling different things. What works well for one business, may not work at all for another. Adminsoft Accounts tries to be flexible enough to handle the majority of requirements, to a degree. The problem is, the more flexible it tries to be, the more complicated it becomes. Probably never more so than in the Sales Order Processing module.

A sales order/job is fundamental to the Sales Order Processing system. The whole module is based around orders/jobs. There are fundamentally two types of business:

A) A business that takes orders from their customers, and either supplies from stock or buys the items in, and then delivers to the customer. Whatever the customer orders, that's exactly what the business supplies. It isn't doing anything to the items, if just forwards them to the customer. Sometimes the items go straight from supplier to the customer, and the business never actually sees them at all (often called 'drop shipping'). In this type of business, the costs would look exactly the same as the charges, or very similar (except there would of course be a mark up to allow the business to actually make some money).
B) A business that takes an order form the customer, and in to fulfil that order it needs to buy perhaps a range od products and/or services. For example, a customer orders 20 yards of fencing to be erected, and that's what the customer expects to see on their invoice. But to fulfil the order, the business has to order fence panels, posts, concrete, etc. In this type of the business, the costs would look very different to the charges. The charge may only consist of one line ("Erect 20 yards of fence" in this case).

It's important to identify what type of business your business is, because you need to make a decision about what happens when items are delivered to your customer. Are they books out in the '**Costs from suppliers**' section, or the '**Charges to Customer**' section, or both?

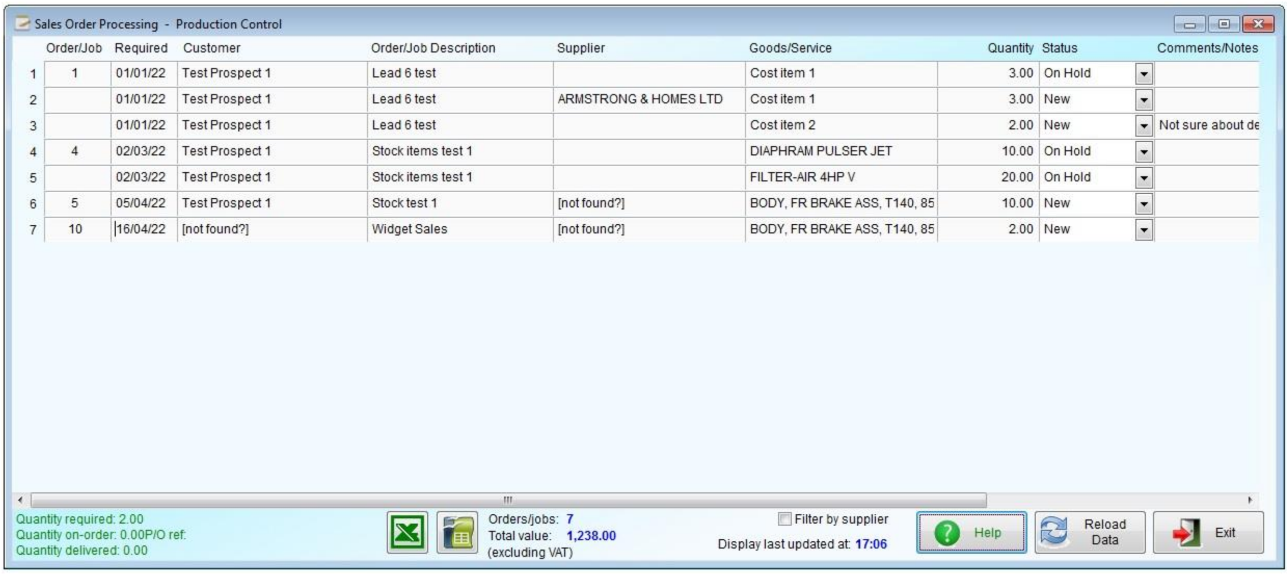
With business type A, you may want to book all items out via the '**Charges to Customer**' section. This can update the stock (for any items that are stock items), record the number delivered to customer in the job, and output a Delivery Note if required.

With business type B, you can't book out via the '**Charges to Customer**' section, because it may be that nothing in that section relates to the actual items you've used to fulfil the order. Instead, you might want to book items out via the '**Costs from suppliers**' section. This will then update the stock for any stock items, and update the numbers delivered to the customer (albeit as part of an overall job). You can still print a Delivery Note if required (though it may not be required for this type of business). The disadvantage with this method, is that stock/inventory control will not know how much an item is being sold for. But then with this type of business, individual items may never or rarely be priced, as they are just a constituent part of an overall sale.

You can set up which method you require in Setup -> Sales Prospecting and Processing -> Settings. Click the 'Sales Order/Job Delivery' tab at the top. By default, both methods are enabled. Which means you decide which to use when working with the order/job. But you can only use one or the other for any one order/job, otherwise the order/job details will not be able to maintain the quantities delivered to the customer. If your business does not neatly fit into one of the two categories above, then you may have to leave the settings as they are. If your business does fit one of those categories, then you can remove one set of options. Which means users can only book items out in one section, eliminating the possibility of error.

CONTROLLING ORDERS/JOBS

There are various reports and lists in Sales Order processing to help you find out what's going on. There is one option in particular that you may find very useful. In the Sales Order Processing drop down menu, the option is called '**Production Control**'. Select this option, and you'll see a window looking something like this:



This lists each cost item in a job, where the job status is not 'Completed' or 'Cancelled', and the item quantity is greater than 1. It assumes where the quantity is 1, it's likely to be delivery cost or similar. So, that's something to bear in mind.

You may notice the last line (order/job 10), in the '**Customer**' column it says '**[not found?]**'. In tis column, the customer details are from the prospect record, NOT the customer account record. It is possible to create an order/job with no prospect record. Which is the case with order/job 10 in our example above. The same '**[not found?]**' message can also be seen in in the '**Supplier**' column for order/jobs 5 and 10. This indicates the initial supplier selected for those items is no longer available. As a supplier is optional, where there is no supplier, the data cell is just empty.

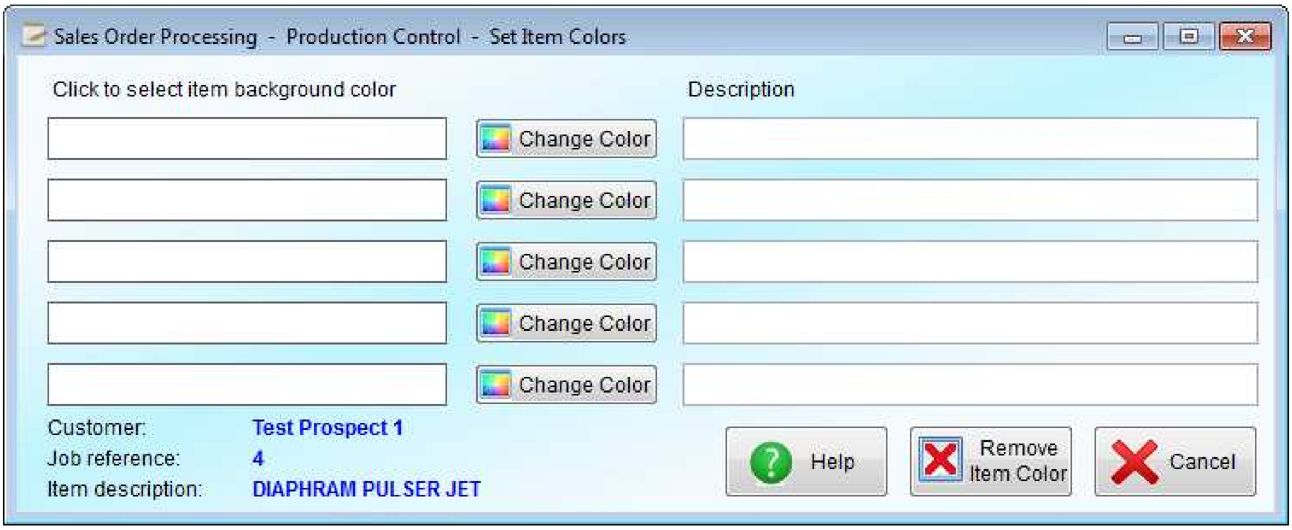
This is the main option for monitoring all items being supplied as part of an order/job. It lists all jobs that do not have a status of 'Completed' or 'Cancelled'. This includes all the cost items in each job, unless the item has a status of 'Completed'. Setting the status to 'All Delivered' will not remove the item from this option, only setting it to 'Completed' or 'Cancelled' will do that. Even then, the item will remain displayed until you exit the Production Control option and then re-enter it, or click the '**Reload Data**' button. This is to allow you the opportunity to check you have set the correct items to 'Completed', before they vanish from view.

Only items with a quantity over 1 are selected to appear. It's assumed where the quantity is only 1, the item is probably carriage or something similar, and so does not require monitoring.

Note: any changes made to any orders/jobs listed will not automatically update this option. There is a '**Reload Data**' button available at the bottom of the window that will refresh the data. Any changes made directly through this option, such as changing the status of an item, will appear straight way, and will also update the item record straight away.

If you run the mouse cursor over the data being displayed, you'll see some extra information appear in the bottom left hand corner. If you single left click into a particular data item (or 'cell' if it were a spreadsheet), full details will appear in a window. Clicking on '**Order/Job**', '**Required**', '**Order/Job Description**' or either of the two user defined data items (if they are present) will bring up the order/job details. Clicking on '**Customer**' will display the prospect details. Clicking on '**Supplier**' will display the supplier account details (provided you have access rights). Clicking on '**Goods/Service**' or '**Quantity**' will display the Purchase Order (again, provided you have access rights), and clicking on either of the '**Comments/Notes/Events**' data items will display a list of previous comments for that item.

The orders/jobs are displayed in the order in which they are required, with the oldest dates first. On the assumption they're like to be more urgent. Sometimes it can be useful to highlight some orders/jobs or particular items. If you right click on an item, a window will appear allowing you to select a background color with which to highlight the item. When you first use this option, you will need to set up the colors and provide a short description of what each one means. This is the window that appears:



The left hand side of the window looks like a column of five input fields, but they're not. They're the background colors that you can setup and use in the Production Control window.

You can setup up to five different colors. On the right hand side of this window you can enter a short description, just to remind you what each color means. Click the '**Change Color**' button to setup or change a background color. Once the colors and descriptions have been setup, they'll remain there, until/unless you edit them at any time. ***Note: any edits will be lost if you click the 'Cancel' button.*** So, if you need to save edits to the color and/or descriptions, but don't want to set a color on the item you clicked on to bring up this option, click the '**Remove Item Color**' button to exit this option.

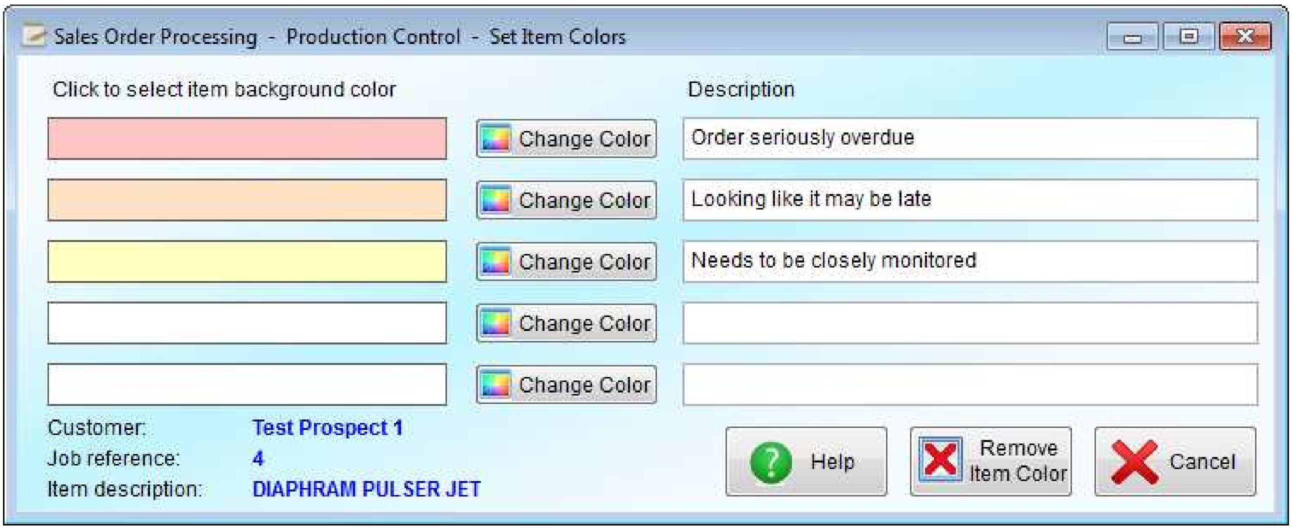
To select a background color for an item, simply click one of the colored boxes on the left hand side of this window. To remove the color of a selected item, click the '**Remove Item Color**' button. Always select light colors. Heavy colors may make the text in the field being highlighted difficult to read. When you click the '**Change Color**' button, select an initial color, and then click 'Define Custom Colors', as this will allow you to select a lighter version of the color selected.

Any items that have their color set, will retain that color when production control is closed, and later opened up again.

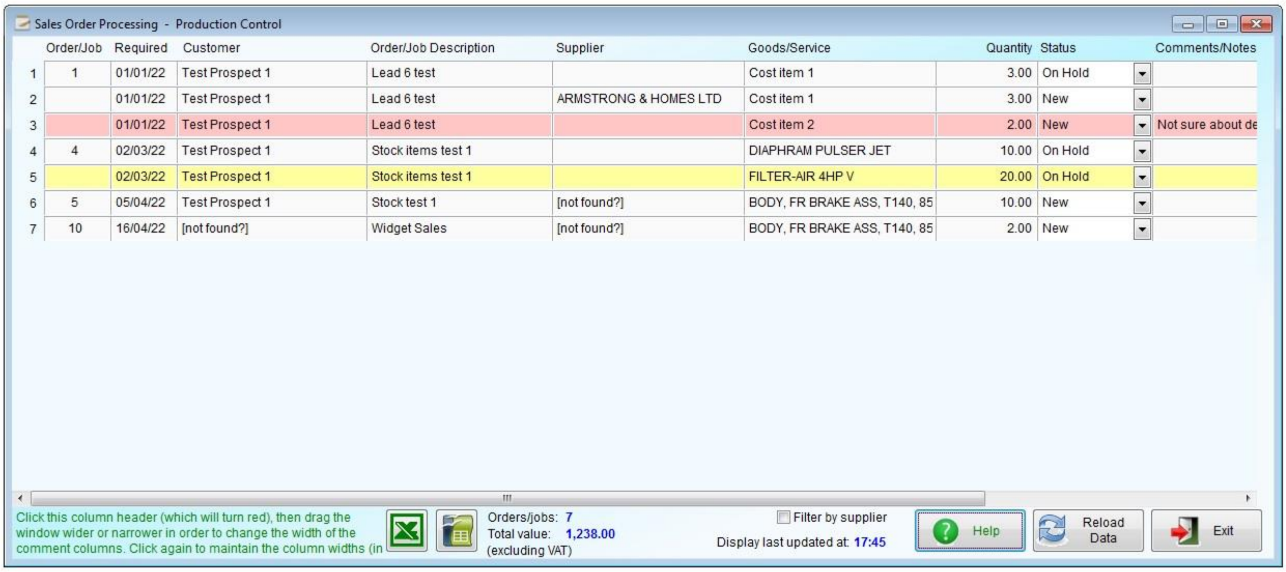
Clicking the '**Cancel**' button will close this window without changing the background color of an item. However, if you have edited the colors or color descriptions, those edits will be lost.

If having initially set up the colors in this option, you can change them at any time, along with the description. The colors of any items shown in Production Control will be updated when the data displayed in Production Control is next updated.

Next is an image of the window with some colors setup, along with short descriptions to indicate what they could be used for:



Then below I've highlighted some items using the colors I've just setup:



Once an item has been highlighted, that highlight will remain. When you, or anyone else goes back into the Production Control option, any highlights will still be there. They can be removed by right clicking into the data item. If you right click in any cell in the '**Order/Job**' column, it will highlight all items for that order/job. If any items were highlighted already, the color will be changed to whatever color is being used to highlight the whole order/job.

This Production Control option can be dragged wider/narrower, higher/shorter as required. If the window is too small to display all the data cells, you will notice one or two scroll bars will be available to allow you to navigate the available information without changing the overall size of the window (useful if screen space is at a premium). Some columns may not be wide enough to display all text available to them. If you cursor over a cell, the full text will appear in the bottom left hand corner. However, you can make a column wider (or narrower). Simply click on the column title header at the top of the window, it should turn red to show the column has been selected. You can then drag the window wider (or narrower) and the width of the selected column will change accordingly. Click the column title header again to fix the column at that width. This change in width is only applicable to the current session in the Product Control option. It will revert back to normal when you exit the option and go back into it again.

'**Filter by supplier**' when clicked will display a list of all the suppliers in use in the current list of orders/jobs. If you select one, only the items being supplied by the selected supplier will appear. If you click '**Filter by supplier**' again, the filter will be removed, and items for all suppliers will appear.

If the user defined code is in use, there will also be a filter for this, which works in the same say as the '**Filter by supplier**'. Both filters can be used at the same time, if required.

' **Comments/Notes** ' displays any comments/notes associated with a particular item. To add a comment/note, click on the ' + ' button that sits between the two comments/notes cells displayed. The first cell will clear, allowing you to type a comment/note into it. When done, press the Tab or Enter key on your keyboard, and the comment//note will be saved straight way. If there was a comment/note in the cell before, it will move sideways into the second cell. If you don't type anything in, but leave the cell empty, it will be ignored. You may wish to use these comments/notes for things like courier information, or good being collected, or reason for a delay, etc. Each time you add a comment/note, it is added to a list (single left click on a comment/note cell to see the list). Although only the last two comments/notes are displayed, nothing is lost.

There are options to output the contents of Product Control to a Microsoft Excel or OpenOffice Calc spreadsheet (which ever one you select, the software must be installed on your PC). The data will appear just as it does in Production Control, including any highlight colors.

End of document