



Berkeley Myles Solutions Ltd.

Progress Plus

Software Changes

Changes from 01-Jul-24 to 31-Aug-25

<u>Sections</u>	<u>Pages</u>
Today	<u>2 - 6</u>
Customers	<u>7 - 17</u>
Suppliers	<u>18 - 33</u>
Inventory	<u>34 - 44</u>
Work Orders	<u>45 - 49</u>
Labour	<u>50 - 50</u>
T & A	<u>51 - 51</u>
SFL	<u>52 - 52</u>
Quality	<u>53 - 58</u>
Message Centre	<u>59 - 59</u>
Reports	<u>60 - 70</u>
SFDC	<u>71 - 76</u>
SFDC Material	<u>77 - 78</u>
Tools	<u>79 - 82</u>
Holidays	<u>83 - 83</u>
Maintenance	<u>84 - 84</u>
Miscellaneous	<u>85 - 87</u>
Admin	<u>88 - 91</u>

Section – Today

Today

Today - To Do - PO header INTERNAL note added to Purchase Orders Due, Purchase Orders By Promised Date and Purchase Orders By Latest Date screens

Today: - To Do: - POs Due, By Latest and Promised Date. Add PO Header Internal note to grid – Ticket 60036 (08/07/2024 10:17)

To Do - Purchase Orders by Latest (36)									
Drag a column header here to group by that column.									
PO No	Line	Item	Sub Con	Supplier	Contact	PO Internal Notes	Part No		De
1143	3	3	<input type="checkbox"/>	Aalco Ltd	Martin Brawley		40202		Do
1143	1	1	<input type="checkbox"/>	Aalco Ltd	Martin Brawley		AT001		Ce
1143	2	2	<input type="checkbox"/>	Aalco Ltd	Martin Brawley		AT008		Ce
1135	2	2	<input type="checkbox"/>	Fulton Machining Ltd	Robert Fulton		P-39393		Co
1147	1	1	<input type="checkbox"/>	Abbott Metal Supplies Ltd	Rebecca Morgan		SRB-EN8-12-0001		Br
1147	2	2	<input type="checkbox"/>	Abbott Metal Supplies Ltd	Rebecca Morgan		SRB-EN8-12-0001		Br
1162	1	1	<input checked="" type="checkbox"/>	Cuny Coatings Ltd			Heat Treat As Per Instructions		He
1161	1	1	<input type="checkbox"/>	Cuny Coatings Ltd			40178		Do
1158	1	1	<input type="checkbox"/>	Fulton Machining Ltd	Robert Fulton	Ensure parts supplied in recyclable packaging	P-39393		Co
1163	1	1	<input type="checkbox"/>	Banner Metals & Fixings Ltd	Wilson Hamis		60045		O2
1160	1	1	<input type="checkbox"/>	Banner Metals & Fixings Ltd	Wilson Hamis		040202		Do

Today

Today - To Do - Comments column added to the O/S Enquiry Contract Review screen

Today: - To Do: - O/S Enquiry Contract Review added Comments to the Grid – Ticket 61896 (27/08/2024 15:24)

To Do - Enquiry Contract Reviews (1)									
Drag a column header here to group by that column.									
Review No	Task No	Eng No	Department	Review Date	Target Date	Task	Assigned To	Comments	
39	1	940		18/11/2024	15/11/2024	Check Any Relevant Customer Drawing / Sketch	Harry Hodgson	Check Drawings	

Today

Today->Expedite Review added columns on Supplier, Buyer, Subcon, Department and Expedite Notes - Ticket 66138 (24/12/2024)

Purchase Order Expedite Review (23)									
Drag a column header here to group by that column.									
PO No	Line No	Supplier	Buyer	Expedite Notes	Expedite Feedback Notes	Part No	Description	Department	
1163	1	Banner Metals & Fixings Ltd	Graham Prentice			60045	O2 Sensor Boss (For use with 060031 ...		
1166	1	Banner Metals & Fixings Ltd	Harry Hodgson				Weld As Per Instructions		
1156	1	Banner Metals & Fixings Ltd	Graham Prentice			050323	A/F Meter Mild Steel (Heat Treated) In...		
1165	1	Banner Metals & Fixings Ltd	Harry Hodgson			900132	425 Stator PCB		
1167	1	Banner Metals & Fixings Ltd	Harry Hodgson			060449	O2 Sensor Boss (For use with 060444 ...		
1168	1	Banner Metals & Fixings Ltd	Harry Hodgson			060449	O2 Sensor Boss (For use with 060444 ...		
1169	3	Banner Metals & Fixings Ltd	Harry Hodgson			900132	425 Stator PCB		
1169	1	Banner Metals & Fixings Ltd	Harry Hodgson	Expedite Note 1169/1		060449	O2 Sensor Boss (For use with 060444 ...		
1169	2	Banner Metals & Fixings Ltd	Harry Hodgson			060449	O2 Sensor Boss (For use with 060444 ...		
1219	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap	Top Ten	
1182	1	Banner Metals & Fixings Ltd	Harry Hodgson				Chrome Plate As Per Instructions		
1219	2	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap	Top Ten	
1225	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap	Top Ten	
1231	2	Banner Metals & Fixings Ltd	Harry Hodgson			DC6688	Coupling Inserts		
1247	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1248	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1248	2	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1243	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1245	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1246	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1250	1	Banner Metals & Fixings Ltd	Harry Hodgson	Please bring forward by 1 w...	I've brought it forward by 1 we...	EC120	End Cap		
1249	1	Banner Metals & Fixings Ltd	Harry Hodgson			EC120	End Cap		
1244	1	Banner Metals & Fixings Ltd	Harry Hodgson		Expedite Note Feedback	EC120	End Cap		

Today

Today - To Do – Submitted flag added to grid of Purchase Orders By Promised Date and Purchase Orders By Latest Date screens

Today screen - Purchase Orders by Promised, Latest Date. Added Submitted checkbox - Ticket 66569 (08/01/2025 15:24)

To Do - Purchase Orders by Promised Date (50)								
Drag a column header here to group by that column.								
PO No	Line	Item	Sub Con	Submitted	Supplier	Contact	Part No	
1143	3	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walco Ltd	Martin Brawley	040202	
1143	2	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walco Ltd	Martin Brawley	BAT008	
1143	1	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walco Ltd	Martin Brawley	BAT001	
1135	2	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulton Machining Ltd	Robert Fulton	CP-39393	
1147	1	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Abbott Metal Supplies Ltd	Rebecca Morgan	MSRB-EN8-12-0001	
1147	2	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Abbott Metal Supplies Ltd	Rebecca Morgan	MSRB-EN8-12-0001	
1155	1	1	<input type="checkbox"/>	<input type="checkbox"/>	Amival Components Ltd	Fred White	050323	
1159	1	1	<input type="checkbox"/>	<input type="checkbox"/>	Banner Metals & Fixings Ltd	Graham Prentice	SSRB-303-08-0004	

To Do - Purchase Orders by Latest (50)								
Drag a column header here to group by that column.								
PO No	Line	Item	Sub Con	Submitted	Supplier	Contact	Part No	
1143	3	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walco Ltd	Martin Brawley	040202	
1143	1	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walco Ltd	Martin Brawley	BAT001	
1143	2	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walco Ltd	Martin Brawley	BAT008	
1135	2	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulton Machining Ltd	Robert Fulton	CP-39393	
1147	1	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Abbott Metal Supplies Ltd	Rebecca Morgan	MSRB-EN8-12-0001	
1147	2	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Abbott Metal Supplies Ltd	Rebecca Morgan	MSRB-EN8-12-0001	
1162	1	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cuny Coatings Ltd		Heat Treat As Per Instructions	
1161	1	1	<input type="checkbox"/>	<input type="checkbox"/>	Cuny Coatings Ltd		040178	

Today

Today - To Do - New Outstanding PO Certs screen added for Enhanced PO Certification functionality

Today: - To Do: - Outstanding PO Certs added - Ticket 67719 (14/03/2025 14:13)

To Do - Outstanding PO Certificates (5)				
Drag a column header here to group by that column.				
PO No	Line	Item	Certificate	
1684	1	1	Certificate of Conformity	
1726	1	1	Certificate of Conformity	
1775	1	1	Certificate of Conformity	
1854	1	1	Certificate of Conformity	
1854	1	1	Material Specification	

Today

Today - To Do - Option to hide ON HOLD work orders from Purchase Orders, Purchase Orders By Promised Date, and Purchase Orders By Latest date screens.

Today - To Do - PO line status added to Purchase Orders, Purchase Orders By Promised Date, and Purchase Orders By Latest date screens

Today :- To Do :- Added Status column to Purchase Orders, PO's by Promised and PO's by latest. Also added a checkbox to the footer to hide PO's who's Work Order is On Hold - Ticket 68144 (19/03/2025 14:21)

To Do - Purchase Orders Due (289)						
Drag a column header here to group by that column.						
PO No	Line	Item	Sub Con	Supplier	Status	
565	2	2	<input type="checkbox"/>	Bevan	Entered	
738	1	1	<input type="checkbox"/>	Central Plastics Ltd	Entered	
743	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
746	1	1	<input type="checkbox"/>	Bevan	Entered	
744	4	4	<input type="checkbox"/>	Bevan	Entered	
744	5	5	<input type="checkbox"/>	Bevan	Entered	
736	2	2	<input type="checkbox"/>	Able Plating Co. Ltd	Entered	
758	1	1	<input checked="" type="checkbox"/>	Unique Heat Treatments Ltd	Entered	
767	1	1	<input checked="" type="checkbox"/>	Able Plating Co. Ltd	Entered	
745	1	1	<input type="checkbox"/>	Bevan	Entered	
745	2	2	<input type="checkbox"/>	Bevan	Entered	
745	3	3	<input type="checkbox"/>	Bevan	Entered	
550	1	1	<input type="checkbox"/>	Abbey Engineering Ltd	Entered	
775	1	1	<input type="checkbox"/>	Banner Metals Ltd	Entered	
783	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
784	1	1	<input checked="" type="checkbox"/>	Able Plating Co. Ltd	Entered	
785	1	1	<input type="checkbox"/>	Aalco Ltd.	Entered	
785	2	2	<input type="checkbox"/>	Aalco Ltd.	Entered	
797	1	1	<input type="checkbox"/>	Cromwell Tools Ltd	Part Received	
796	1	1	<input checked="" type="checkbox"/>	Able Plating Co. Ltd	Entered	
795	1	1	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
802	1	1	<input type="checkbox"/>	Enco S.A.	Entered	
808	2	2	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
817	1	1	<input type="checkbox"/>	Enco S.A.	Entered	
818	2	2	<input type="checkbox"/>	Cumy Coatings	Entered	
819	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
821	1	1	<input checked="" type="checkbox"/>	DHL Express	Entered	
822	1	1	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
824	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
825	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
826	1	1	<input type="checkbox"/>	DHL Express	Part Received	
827	1	1	<input type="checkbox"/>	Arrival Components Ltd	Entered	
831	1	1	<input type="checkbox"/>	Banner Metals Ltd	Entered	
836	1	1	<input type="checkbox"/>	Arrival Components Ltd	Entered	
837	2	2	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
837	1	1	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
852	1	1	<input type="checkbox"/>	Test Company	Entered	
855	1	1	<input type="checkbox"/>	Test Company 2	Entered	
860	1	1	<input type="checkbox"/>	Central Plastics Ltd	Entered	
861	1	1	<input type="checkbox"/>	Aalco Ltd.	Entered	
864	1	2	<input type="checkbox"/>	Able Plating Co. Ltd	Part Received	
868	1	1	<input checked="" type="checkbox"/>	Banner Metals Ltd	Entered	
887	1	1	<input type="checkbox"/>	Test Company 2	Entered	
896	1	1	<input type="checkbox"/>	Able Plating Co. Ltd	Entered	
899	1	1	<input type="checkbox"/>	Test Company 2	Entered	
<input type="checkbox"/> Exclude On Hold WOs						

To Do - Purchase Orders Due (288)						
Drag a column header here to group by that column.						
PO No	Line	Item	Sub Con	Supplier	Status	
738	1	1	<input type="checkbox"/>	Central Plastics Ltd	Entered	
743	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
746	1	1	<input type="checkbox"/>	Bevan	Entered	
744	4	4	<input type="checkbox"/>	Bevan	Entered	
744	5	5	<input type="checkbox"/>	Bevan	Entered	
736	2	2	<input type="checkbox"/>	Able Plating Co. Ltd	Entered	
758	1	1	<input checked="" type="checkbox"/>	Unique Heat Treatments Ltd	Entered	
767	1	1	<input checked="" type="checkbox"/>	Able Plating Co. Ltd	Entered	
745	1	1	<input type="checkbox"/>	Bevan	Entered	
745	2	2	<input type="checkbox"/>	Bevan	Entered	
745	3	3	<input type="checkbox"/>	Bevan	Entered	
550	1	1	<input type="checkbox"/>	Abbey Engineering Ltd	Entered	
775	1	1	<input type="checkbox"/>	Banner Metals Ltd	Entered	
783	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
784	1	1	<input checked="" type="checkbox"/>	Able Plating Co. Ltd	Entered	
785	1	1	<input type="checkbox"/>	Aalco Ltd.	Entered	
785	2	2	<input type="checkbox"/>	Aalco Ltd.	Entered	
797	1	1	<input type="checkbox"/>	Cromwell Tools Ltd	Part Received	
796	1	1	<input checked="" type="checkbox"/>	Able Plating Co. Ltd	Entered	
795	1	1	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
802	1	1	<input type="checkbox"/>	Enco S.A.	Entered	
817	1	1	<input type="checkbox"/>	Enco S.A.	Entered	
818	2	2	<input type="checkbox"/>	Cumy Coatings	Entered	
819	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
821	1	1	<input checked="" type="checkbox"/>	DHL Express	Entered	
822	1	1	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
824	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
825	1	1	<input checked="" type="checkbox"/>	Cumy Coatings	Entered	
826	1	1	<input type="checkbox"/>	DHL Express	Part Received	
827	1	1	<input type="checkbox"/>	Arrival Components Ltd	Entered	
831	1	1	<input type="checkbox"/>	Banner Metals Ltd	Entered	
836	1	1	<input type="checkbox"/>	Arrival Components Ltd	Entered	
837	2	2	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
837	1	1	<input checked="" type="checkbox"/>	Arrival Components Ltd	Entered	
852	1	1	<input type="checkbox"/>	Test Company	Entered	
855	1	1	<input type="checkbox"/>	Test Company 2	Entered	
860	1	1	<input type="checkbox"/>	Central Plastics Ltd	Entered	
861	1	1	<input type="checkbox"/>	Aalco Ltd.	Entered	
864	1	2	<input type="checkbox"/>	Able Plating Co. Ltd	Part Received	
868	1	1	<input checked="" type="checkbox"/>	Banner Metals Ltd	Entered	
887	1	1	<input type="checkbox"/>	Test Company 2	Entered	
896	1	1	<input type="checkbox"/>	Able Plating Co. Ltd	Entered	
900	1	1	<input type="checkbox"/>	Test Company 2	Entered	
904	1	1	<input type="checkbox"/>	Test Company 2	Entered	
905	1	1	<input type="checkbox"/>	Test Company 2	Entered	
<input checked="" type="checkbox"/> Exclude On Hold WOs						

Today

Today - To Do - Expired Company Documents screen now shows expired documents in red to highlight them

Today :- To Do :- Expired Company Documents: - Show Expired in red - Ticket 67722 (20/03/2025 10:21)

To Do - Expired Company Documents (2)						
Drag a column header here to group by that column.						
File Name	Path	Added By	Date	Type	Notes	Expiry Date
BOM Export.xlsx	\\BMS-SRV001\Training Dept\Intern...	developer	27/10/2022	Machine Image	test	20/01/2025
47 rout test.xlsx	C:\Users\andrewb\Desktop\exports\...	AndrewB	29/01/2025			01/05/2025

Due No of Days

Today

Today - To Do - WO with All Material Available to Issue has additional column Stock Category added

Today screen "WO with all Material Available to Issue" - Added Stock Category - Ticket 69203 (28/04/2025 10:31)

Key Indicators - Works Orders with All Material Available to Issue (17)							
Drag a column header here to group by that column.							
WO No	Part No	Rev	Description	Group Code	Stock Category	Reference	Department
2857	050302		A/F Meter Stainless Steel Install Kit W...	Sales - Auto Boss	A		
2855	050301		A/F Meter Stainless Steel Install Kit Bu...	Sales - Auto Boss	A		
2829	W-770531		Splined Drive Shaft	Sales	A		
2796	060161		Turbo Outlet (Short) - Subaru	Sales - Auto Boss	A		
2782	MP- 3849393		Manufactured Part 2	Sales	A		PC
2764	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2763	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2762	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2761	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2760	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2759	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2758	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2756	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2755	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2754	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		PC
2737	060031		Turbo Outlet (Including O2 Sensor Boss)	Sales - Auto Boss	A		
2700	L-49002883		Capacitor Main Assembly	Sales	A		

Today

Today - To Do - Grid filters added to all Today screens

Today screen grids - Added Grid Filters - Ticket 69195 (28/04/2025 9:54)

Key Indicators - Works Orders with All Material Issued but not yet started (21)							
Drag a column header here to group by that column.							
WO No	Part No	Rev	Description	Group Code	Reference	Department	
2857	050302		A/F Meter Stainless Steel Install Kit W...	Sales - Auto Boss			
2837	ACT40V Cal/Service		Calibration or repair to ACT40V	Sales			
2806	050300		A/F Meter Stainless Steel Install Kit - I...	Sales - Auto Boss			
2803	070033		Exhaust Manifold - 4G63 Engine Type...	Sales - Auto Boss	BRA-02394-28374	Branch 2	
2802	070021		Exhaust Manifold - CA18DET Engine ...	Sales - Auto Boss	BRA-02394-28374	Branch 2	
2801	070015		Exhaust Manifold - SR20DET Engine ...	Sales - Auto Boss	BRA-02394-28374	Branch 2	
2798	080456	H	Taurus 26 inch 18 Speed Racing Frame	Sales	MOD-8372-34987	Branch 1	
2788	3636634GH		Compressor Delivery Casing	Sales	N 3595490670 - Call Off		

Today

Today - To Do - New calendar added for SO by Latest date

Today screen Calendar - Added SO By Latest Date – Ticket 68851 (17/04/2025 10:28)

Today

Quick Search

Delivery Analysis

Delivery Analysis By Promised Date

Invoiced this Month

Holidays - Factory

Holidays - Employee

Holidays - Work Centre

Absences - Employee

Calendar View

Enquiries by Respond Date

Enquiries by Decision Date

My Enquiries to Follow Up

All Enquiries to Follow Up

Enquiry Contract Reveiws by Target Date

Contract Reveiws by Target Date

Sales Orders by Required Date

Sales Orders by Promised Date

Sales Orders by Latest Date

Work Orders by Sched Start Date

Work Orders by Sched Finish Date

Purchase Orders by Promised Date

Purchase Orders by Required Date

☐ Combine Results

May 2025

M	T	W	T	F	S	S
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Calendar View

1 Day5 Work Week7 Week31 Month

12-May-202515-Jun-2025Today

	Monday	Tuesday	Wednesday
May 12	13	14	
May 12-18	SO Due By Latest Date 47		
May 19-25	19	20	21
May 26-Jun 01	26	27	28

Section – Customers

Customers

Customers - Customer List - Option added to Contacts tab to allow email to be generated directly from contact

Suppliers - Contacts - Option added to allow email to be generated directly from contact

Customer & Supplier Contacts: - Added a build button to the Email address field on the contacts grid that opens a new Email message – Ticket 60069 (08/07/2024 14:06)

Supplier: BAN001

Details

Defaults

Contacts

Alternative Addresses

Purchase Discount

Customer Contacts

Title	First Name	Last Name	Address Name	Email	Line 1	Line 2	Line 3	Line 4	Line 5
Mr	Bruce	Banner	Default	brucebanner1969@outlook...	Banner House	Quayside Park	Greenock		PA45 3GH
Mr	Wilson	Hamis	Default	wilsonphamis@outlook.com	Banner House	Quayside Park	Greenock		PA45 3GH
Mr	Harry	Hodgson	Default	harryshodgson@hotmail.co.uk	Banner House	Quayside Park	Greenock		PA45 3GH
Mr	Ian	Wylie	Default		Banner House	Quayside Park	Greenock		PA45 3GH

New Email

Message

Associated Documents

Message

Email

Date

18/11/2024 11:15:26

Type

Request Read Receipt

☐

To ...

brucebanner1969@outlook.com

Priority

Normal

Cc ...

Contact

Bcc ...

Subject

Attach

Customers

Customers - Sales Orders - New option to assign project to all SO lines

Added "Set ALL lines to this Project" on the SO Zoom form - Ticket 60453 (22/07/2024 15:57)

The screenshot displays the 'Sales Order Line: 1' form. The 'Header' tab is active, showing 'Sales Order: 1233'. The 'Line Details' tab is also visible, showing 'Quantity and Costs' and 'Line Details' sections. In the 'Line Details' section, the 'Project' dropdown is set to 'Set ALL lines to this Project'. Other fields include 'Quantity' (1.00), 'Unit Price' (£239.292858), 'VAT Rate %' (20.00), 'VAT Cost' (£47.86), 'Net Cost' (£239.29), and 'Total Cost' (£287.15). The 'User Defined Fields' section shows 'Protection Type'. The 'Line Notes' section has 'External' and 'Internal' tabs. The 'Menu' button is highlighted in the bottom left corner.

Customers

Contacts form: - Address Name Dropdown. Increased column size so the full name can be seen – Ticket 61380 (13/08/2024 9:28)

The screenshot displays the 'Contact' form for 'Customer: DYN001'. The 'Details' tab is active, showing 'Title / First Name' (Dr. Charles Marsden), 'Surname', 'Address Name' (Sales Office Dorset), 'Address', 'Postcode', 'Telephone No', 'Mobile No', 'Fax No', 'Email Address', and 'Position'. The 'Address Name' dropdown is highlighted with a red box. The 'Grid Options' button is highlighted in the bottom left corner.

Customers

Customers - Customer List - Added enquiry and sales contract reviews to Related Items tab

Added Enquiry/Sales Contract Review related Items options to the Customer detail form - Ticket 62893 (19/09/2024 12:06)

The screenshot shows the 'Customer: DYN001' window. The 'Related Items' tab is selected and highlighted with a red box. On the left, a list of transaction types is shown, with 'ECR' and 'CR' highlighted by a red box. The main area displays a table of related items:

CR No	SO/Line	Status	Review Date	Job Type
125	1241/1	Open	13/11/2024	New Job

At the bottom, there are buttons for 'IM', 'Menu', 'Accept', and 'Close'.

Customers

Customers - Enquiries - Importing enquiry lines for existing parts populates enquiry details from master part records

Enquiry Import: - if importing existing part numbers, fill in other values (description, drawing no, rev, customer part no) from the part number if these values are not entered in the spreadsheet. - Promised Date is not required on an Enquiry Line, so should not be a required field on the import either. - Ticket 58628 (03/10/2024 12:16)

The screenshot shows the 'Enquiry: 942' window. The 'Header' tab is selected. The 'Header Information' section contains fields for Enquiry Number (942), Customer Account (DYN001), Customer Name (Dynamic-Ceramic Ltd), Currency/Rate (Sterling, 1.0000), Contact Name, Estimator (Harry Hodgson), Sales Rep, Status ((1) Received), Reference, Department, Enquiry Date (25/11/2024), Revision, Follow Up By (Harry Hodgson), Respond By (28/11/2024), Submitted, Decision By (04/12/2024), and Decided. The 'Line Details' section shows a table with columns for Part No, Drawing No, Rev, and Cust Part No. A context menu is open over the table, with 'Enquiry Import' selected, and a sub-menu showing 'Export Template' and 'Import Lines'. At the bottom, there are buttons for 'IM', 'Menu', 'Print', 'Accept', and 'Close'.

Customers

Credit Limit field on the Customer Detail form is now enabled on the AccountsLink user permission - Ticket 63511 (08/10/2024 13:18)

Customers

Customer Detail: - Related Items: - Invoice: - Added Customer O/N to the grid – Ticket 64033 (17/10/2024 11:08)

Customer: HAL001

Details Defaults Contacts Alternative Addresses Sales Discount Price Matrix Analysis **Related Items** Notes

Related Items

Enquiries ECR CR Sales Orders Work Orders Deliveries **Invoices** Credits Sales O/S WO O/S NCR TQ Customer Returns Free Issue Receipts Free Issue Returns

Inv/Line	In...	Invoice Date	Invoiced By	Customer Order No	Quantity	UOI
1475/1	I	30/10/2023	Steven Wilson		2.00	each
1474/1	I	12/09/2023	Steven Wilson		3.00	each
1472/1	I	11/09/2023	Steven Wilson		2.00	each
1395/1	I	30/08/2021	Matthew Gilmour	PO758494	1.00	each
1395/2	I	30/08/2021	Matthew Gilmour	PO758494	1.00	each
1360/1	I	01/02/2021	Mike Gilchrist	PO758493	2.00	each
1352/1	I	15/03/2021	Steven Wilson	PO758494	4.00	each
1352/2	I	15/03/2021	Steven Wilson	PO758494	2.00	each
1352/3	I	15/03/2021	Steven Wilson	PO758494	2.00	each
1352/4	I	15/03/2021	Steven Wilson	PO758494	2.00	each
1337/1	I	09/02/2021	Steven Wilson	PO758493	1.00	each
1337/2	I	09/02/2021	Steven Wilson	PO758493	1.00	each
1336/1	I	09/02/2021	Steven Wilson	PO758493	1.00	each
1335/1	I	09/02/2021	Steven Wilson	PO758493	1.00	each
1334/1	I	09/02/2021	Steven Wilson	PO758493	4.00	each
1303/1	I	28/10/2020	Paul Sikes	PO758493	1.00	each

Limit Records Grid Options

IM Menu Accept Close

Customers

Customers - Enquiries - Enquiry Sales Prices tab revamp

Inventory Detail - Sales Prices Tab: - Revamp of the Sales Prices tab layout, to make the text boxes bigger to allow the user to see large numbers with a high number of decimal points properly - Ticket 63523 (24/10/2024 16:23)

Part No: FRP-12345

Messages Transactions Stock Movement

Part Details More Details BOM Routing Sales Prices Costing Price Matrix Stock Status Related Items Notes Documents

Quote Qty 10.00 Saved Qty Qty Price Per Item 10.00 £250.00

Material & Subcontract Content

0.00 % Sundry Cost	£0.00
0.00 % Sundry Mark-Up	£0.00
Material Cost	£150.00
0.00 % Material Mark-Up	£0.00
Subcontract Cost	£850.00
0.00 % Subcon Mark-Up	£0.00
Material Content Total	£1,000.00
Material Content per Item	£100.00

Labour Content

Labour Cost	£0.00
Labour Cost at Sales Rate	£0.00
Lab at Sales Rate per Hour	£0.00
Amend Labour Cost	£0.00
Amend Lab Cost per Hour	£0.00
0.00 % Labour Mark-Up	£0.00
Labour Content Total	£0.00
Labour Content per Item	£0.00

Overhead Mark-Up & Return per Hour

0.00 % Overhead	£0.00
Total after Overhead	£1,000.00
Total after O/H per Item	£100.00
Return per Hour	£0.00

Profit Mark-Up & Prices

Target Profit 0.00 %	£0.00
Actual Profit 150.00 %	£1,500.00
Gross Profit 150.00 %	£1,500.00
Suggested Price Total	£1,000.00
Suggested Price per Item	£100.00
Selling Price Total	£2,500.00
Selling Price per Item	£250.00

Discount 0.00 % 2,500.00 per Item 250.00

Quantity/Time Cust. Defaults Default Prices

IM Menu Print Accept Close

Customers

Enquiry > View Part: - User had Read Only permissions on an Enquiry, but had full permission on Part Numbers, so from the Read Only Enquiry, viewed the part, made changes to the BOM, routing and Quote Qtys, which PP then prompted the user to save when he closed the Part Number screen. User thought this would update the Quote Qtys on the Enquiry, but for that to happen, the Enquiry has to be saved too, which wasn't allowed as that was Read Only. The user has full permission on Part Numbers, so has to be able to amend those, but it needed to be clearer that those changes would not be reflected in the Enquiry, so the Save and Delete Quote Qty buttons were disabled, a label was added on screen to explain why they are disabled, and pop up a warning message when a Part Number is opened from a Read Only Enquiry. The message reads as follows: - "Enquiry is Read Only. You may still amend the Part Number, but you will be unable to save any changes to the Enquiry that result from these Part Number amendments when you return to the Enquiry. Changes to Quote Quantities are not permitted." - Ticket 64415 (29/10/2024 9:23)

The screenshot shows the 'User Access Rights' window for user 'HaryH'. The 'Customers Access Rights' section is highlighted with a red box. It includes radio buttons for 'Full', 'Read Only', and 'No Access', with 'Full' selected. There are checkboxes for 'Restrict Create New' and 'Edit Markup/Margin % (also applies to Sales Enquiry)'. To the right, there is an 'Additional Security' table with columns 'Field' and 'Restrict'.

Field	Restrict
	<input type="checkbox"/>

The screenshot shows the 'User Access Rights' window for user 'HaryH'. The 'Inventory Access Rights' section is highlighted with a red box. It includes radio buttons for 'Full', 'Read Only', and 'No Access', with 'Full' selected. There are checkboxes for 'Restrict Create New', 'Allocations (Full Access)', 'Allocations - Ignore On Order (WO) for SO Line', 'Release Stock', 'Transfers (Full Access)', 'Transfers (To Quarantine)', and 'Transfers (From Quarantine)'. To the right, there is an 'Additional Security' table with columns 'Field' and 'Restrict'.

Field	Restrict
	<input type="checkbox"/>

The 'BOM & Routing' section is also highlighted with a red box. It contains two sub-sections: 'BOM' and 'Routing'. Both have radio buttons for 'Full', 'Read Only', and 'No Access', with 'Full' selected. There is a checkbox for 'Lock / Release' in both sections.

Field	Restrict
	<input type="checkbox"/>

IM Menu Print Accept Close

IM Menu READ ONLY Print Read Only Close

Customers

Customers - Invoices - Transaction recorded when invoice transferred to accounts

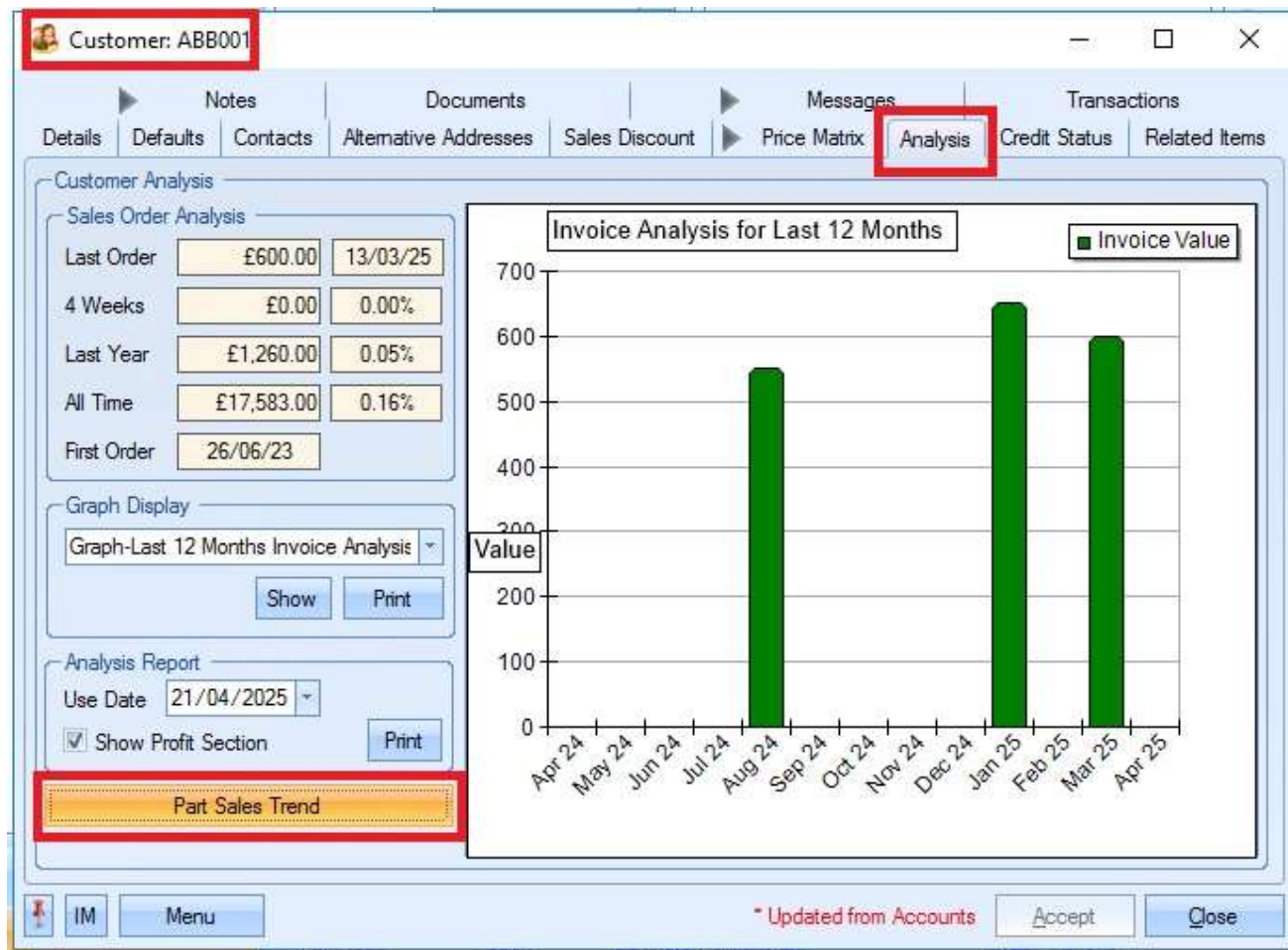
Added transaction history against transferring a SI or PI from the accounts transfer form - Ticket 65868 (05/12/2024 13:27)

Invoice: 1333					
Header Order Details Related Items Notes Documents Messages Transactions					
Transactions					
Date/Time	Transaction Type	User Name	Related Item(s)	Details	
18/03/2025 14:42:40	SalesInvoiceEdited	AndrewH	Customer: ENG002; SalesInvoice: 1333	InvoiceDate edited from 26/11/2024 to 04/11/2024	
22/01/2025 09:28:57	SalesInvoiceEdited	Developer	SalesInvoice: 1333	Transferred from the Accounts Transfer Screen. Dev 22-01-2025	
06/12/2024 11:52:08	FormPrinted	MattG	SalesInvoice: 1333	Invoice No. 1333 Printed	
06/12/2024 11:50:40	FormPrinted	MattG	SalesInvoice: 1333	Invoice No. 1333 Printed	

Customers

Customers - Customer List - Sales Trend option added to Analysis tab allow user to see Sales history/trend

Sales Trend & Purchasing Trend added to Inventory Section and Customer Analysis tab - Ticket 67723 (14/03/2025 14:59)



Sales Trend

Part No: Include last 10 Invoices Quick Date Range Last 24 Months

Customer ABB001 SO Date From 22/04/2023 To 21/04/2025 Refresh Clear

Results

Invoice No	Minimum Price	Maximum Price	Average Price	Selling Price*	1397/1	1366/1	1366/2	1249/1	1081/1	1075/1
Invoice Date					13/03/2025	29/01/2025	29/01/2025	07/08/2024	21/02/2024	14/02/2024
Invoice Qty					10.00	10.00	10.00	10.00	1.00	1.00
SO No					1410/1	1189/1	1231/1	1231/1	1105/1	1003/1
(32961) LN2G-63_80	£10.00	£10.00	£10.00	£49.62	-	£10.00	-	-	£0.00	-
REPAIR	£250.00	£250.00	£250.00	£0.00	-	-	-	-	-	£250.00
SGS1046	£55.00	£60.00	£56.67	£55.00	£60.00	-	£55.00	£55.00	-	-

Customers

Customers - Sales Orders - Part status added to SO Overview screen, and also as a filter

Added Part Status column to SO Overview line grid and filter - Ticket 68426 (25/03/2025 14:39)

Sales Order Overview

Grid Filters

Status <= : 30 Customer ID : Required Date >= 21/04/2024 and 21/04/2025

Part Status : Live

Refresh Clear

Sales Order Details

Notes	SO/Line	Status	Customer	Date	Order No	Department	Part Status
...	1439/1	On Hold	maria: Maria Engineering 2	17/04/2025	NL:	Purchasing	Live
...	1438/1	On Hold	maria: Maria Engineering 2	17/04/2025		Purchasing	Live
...	1437/1	Entered	maria: Maria Engineering 2	17/04/2025		Purchasing	Live
...	1436/1	On Hold	maria: Maria Engineering 2	17/04/2025		Purchasing	Live
...	1435/1	WIP	ABE001: Abercom Systems...	17/04/2025		Factory	Live
...	1434/1	On Hold	maria: Maria Engineering 2	17/04/2025	q	Purchasing	Live
...	1433/1	On Hold	maria: Maria Engineering 2	17/04/2025	bhk	Purchasing	Live
...	1432/1	On Hold	maria: Maria Engineering 2	17/04/2025	hjdhn	Purchasing	Live
...	1431/1	Entered	maria: Maria Engineering 2	17/04/2025		Purchasing	Live
...	1430/1	WIP	maria: Maria Engineering 2	17/04/2025	5	Purchasing	Live
...	1429/1	Entered	A1D001: A1 Design Services	16/04/2025		BV	Live
...	1428/1	Entered	maria: Maria Engineering 2	16/04/2025	b	Accounts	Live

Work Orders Allocations Purchase Orders Contract Review Non Conformance Technical Queries Deliveries Invoices

BOM Routing Purchase Orders Review Tasks Non Conformances Technical Queries

Customers

Customers - Sales Orders - Delivery and Invoice tabs added to SO Overview screen

Added Delivery and Invoice tabs to SO Overview (amended permissions on each tab for relevant security settings) - Ticket 67710 (24/03/2025 9:45)

Sales Order Overview

Grid Filters

Status <= : 50 Status >= : 30 Customer ID : Required Date >= 21/04/2024 and 21/04/2025

Refresh Clear

Sales Order Details

Notes	SO/Line	Status	Customer	Date	Order No	Department	Part No	Part Status
...	1422/1	Invoiced	AB1994: AB	02/04/2025		Accounts	TECH-0204	Live
...	1415/1	Invoiced	ENG002: Engineering ...	26/03/2025	01-04-25		179	Live
...	1415/2	Invoiced	ENG002: Engineering ...	26/03/2025	01-04-25		142	Live
...	1415/5	Invoiced	ENG002: Engineering ...	26/03/2025	01-04-25		186	Live
...	1414/2	Invoiced	ENG002: Engineering ...	25/03/2025	ESL250325	Spares	142	Live
...	1414/2	Invoiced	ENG002: Engineering ...	25/03/2025	ESL250325	Spares	104	Live

Work Orders Allocations Purchase Orders Contract Review Non Conformance Technical Queries **Deliveries** Invoices

Notes	Del/Line	Customer	Del. Date	Reference	Department	Part No	Description	Quantity
...	1381/1	AB1994: AB	02/04/2025		Accounts	TECH-0204	Stock	160.00
...	1380/1	AB1994: AB	02/04/2025		Accounts	TECH-0204	Stock	0.00

BOM Routing Purchase Orders Review Tasks Non Conformances Technical Queries

Sales Order Overview

Grid Filters

Status <= : 50 Customer ID : Required Date >= 21/04/2024 and 21/04/2025 Refresh Clear

Status >= : 30

Sales Order Details

Notes	SO/Line	Status	Customer	Date	Order No	Department	Part No	Part Status
...	1422/1	Invoiced	AB1994: AB	02/04/2025		Accounts	TECH-0204	Live
...	1415/1	Invoiced	ENG002: Engineering ...	26/03/2025	01-04-25		179	Live
...	1415/2	Invoiced	ENG002: Engineering ...	26/03/2025	01-04-25		142	Live
...	1415/5	Invoiced	ENG002: Engineering ...	26/03/2025	01-04-25		186	Live
...	1414/2	Invoiced	ENG002: Engineering ...	25/03/2025	ESL250325	Spares	142	Live
...	1414/2	Invoiced	ENG002: Engineering ...	25/03/2025	ESL250325	Spares	142	Live

Work Orders Allocations Purchase Orders Contract Review Non Conformance Technical Queries Deliveries **Invoices**

Notes	Inv/Line	Invoice Type	Customer	Inv. Date	Quantity	Unit FC	Department	Project	Part No
...	1414/1	C	AB1994: AB	15/04/2025	5.00	0.02			TECH-0204
...	1413/1	I	AB1994: AB	15/04/2025	165.00	0.02			TECH-0204

BOM Routing Purchase Orders Review Tasks Non Conformances Technical Queries

Customers

Customers - Enquiries - New Cost Breakdown Summary (All Qtys) report added to enquiry print option

Customer Enquires: - Cost Breakdown Summary (All Qtys) report added. Shows all Quantities and no totals - Ticket 67822 (03/03/2025 14:00)

Enquiry: 638

Header Enquiry Details Related Items Notes Documents Messages Transactions

Header Information

Enquiry Number 638 Status (1) Received

Customer Account COORSTEK001 Reference

Customer Name CoorsTek Scotland Department

Currency/Rate Sterling 1.0000 Update Enquiry Date 21/04/2025 Revision

Contact Name Follow Up By Harry Hodgson

Estimator Harry Hodgson Respond By 28/04/2025 Submitted

Sales Rep Decision By 06/05/2025 Decided

Line Details

Line No	Item No	Description	Part No	Drawing No	Rev	Cust Part No
1	1	Float Pivot Bush	8132/A			

Enquiry

Cost Breakdown Summary

Cost Breakdown Summary (All Qtys)

Labour Breakdown Summary

Material Breakdown Summary

Print Accept Close

Enquiry Cost Breakdown Summary

Filter Criteria: Enquiry No = 638

Enquiry Part No	Qty	Material			SubCon			Labour			Overhead			Selling Price	Actual Profit	Gross Profit	Return per Hour
		Cost	MarkUp	Total	Cost	MarkUp	Total	@Cost	@Sales	MarkUp	Total	Cost	MarkUp				
638 1 8132/A: FloatPivot	5.00	0.00	0.00	0.00	10.00	0.00	10.00	77.92	141.67	14.17	155.83	165.83	0.00	165.83	187.50	21.67	99.58
638 1 8132/A: FloatPivot	10.00	0.00	0.00	0.00	20.00	0.00	20.00	100.83	183.33	9.17	192.50	212.50	0.00	212.50	240.00	27.50	119.17

Customers

Customers - Sales Orders - APPLY TO ALL LINES option added for nominal code.

Added Nominal to Apply to all Lines on the Sales Order detail form – Ticket 71998 (24/07/2025 14:00)

The screenshot shows the 'Sales Order: 1244' form. The 'Header' tab is selected. The form contains various fields for sales order details, including Sales Order Number (1244), Sales Order Date (18/12/2024), Customer Order No (DCL-565), Customer Account (DYN001), Last Reprint No (1), Contact Name, Sales Rep (Harry Hodgson), Currency/Rate (Sterling, 1.0000), and Submitted date (12/02/2025). A dropdown menu is open from the 'Line Details' section, showing options like 'View Part', 'Copy Order', 'Import', 'Sales Prices', 'Profit', 'Cost Overview', 'Scheduled Invoices', 'Prorata Discount', 'Apply To All Lines', 'Create SO Allocations', 'Release SO Allocations', 'Create Delivery', and 'Technical Query'. The 'Apply To All Lines' option is highlighted with a red box. A secondary menu is open from 'Apply To All Lines', showing options like 'Put all lines On Hold', 'Release all On Hold lines', 'Complete/Cancel to all Lines', 'Set Discount to all Lines', 'Set Surcharge to all Lines', 'Set Required Date to all Lines', 'Set Promised Date to all Lines', 'Set Latest Date to all Lines', 'Set Nominal to All Lines', 'Set Project to All Lines', and 'Set Job Type to All Lines'. The 'Set Nominal to All Lines' option is highlighted with a red box. The 'Sales Order Totals' section shows Net (£ 75,068.00), VAT (£ 15,013.60), and Total (£ 90,081.60). The 'Menu' button at the bottom left is also highlighted with a red box.

Part No	Rev	Description	Cust. Part No	UOM	Quantity	Ship Qty
SP-PP-12		Coupling Assembly		each	300.00	16.00
EC120	C		DCL-EC120	each	2.00	2.00

Sales Order Totals

Net	£ 75,068.00
VAT	£ 15,013.60
Total	£ 90,081.60

The screenshot shows the 'Apply Nominal to All Lines' dialog box. It contains a text input field for entering the nominal value, an 'Accept' button, and a 'Cancel' button.

The user can add certificates, documents, etc. to the list using the blank row at the top of the grid, repeating this process until all are listed.

Certificate	Obsolete
New Cert	<input type="checkbox"/>
Certificate of Conformity	<input type="checkbox"/>
CMM Inspection Report	<input type="checkbox"/>
Inspection Cert	<input type="checkbox"/>
Material Cert	<input type="checkbox"/>

Once complete, the user can click ACCEPT to save the list. Additional certificates and documents can be added at a later date as they become required, with an option to also mark them as obsolete when they are no longer required for use.

PO Certification Requirements

Once the certificates, documents, etc. have been set up, the user can now set the requirements on their purchase orders. An additional tab will be displayed on purchase orders, named *Certificates*. This is where the certificates are setup and, subsequently, marked as received from the supplier.

Purchase Order: 767

Header Contact Details Related Items Notes Documents Messages **Certificates** Transactions

Header Information

Purchase Order No: 767 Rev: Order Date: 14/11/2024 Quote No: Submitted: ☐ Reqn No: Supplier Account: CUR001 Sub Contract: ☐ Method: Approved: ☐ Cury Coatings Ltd Confirmation: ☐ Department: Currency/Rate: GBP 1.0000 Update Acknowledgement No: Standard: Not Rated Buyer: James McCaig Exported: ☐ Proforma: ☐ Proforma Paid: ☐ Approve By:

Line Details

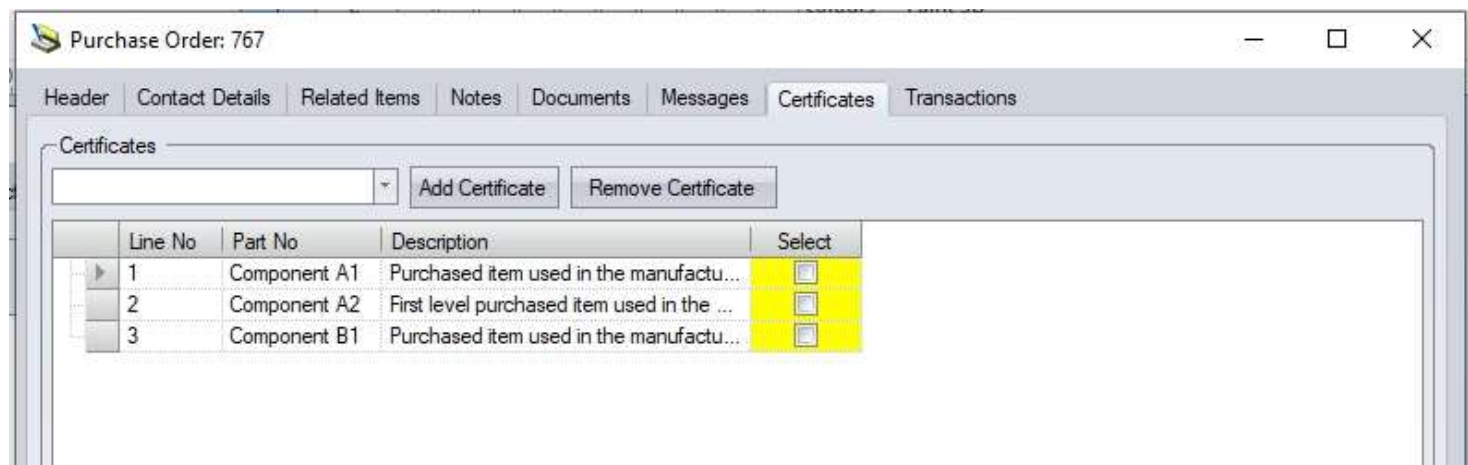
Line	Item No	Part No	Supplier PN	Description	UOP	Part Rev	Status	No Of Units
1	1	Component A1		Purchased item used in the manufactu...	Each		Entered	0.00
2	2	Component A2		First level purchased item used in the ...	Each		Entered	0.00
3	3	Component B1	DEF12345-...	Purchased item used in the manufactu...	Each	F	Entered	0.00

Purchase Order Totals

Net: £3,300.00
VAT: £660.00
Total: £3,960.00

IM Menu Print Accept Close

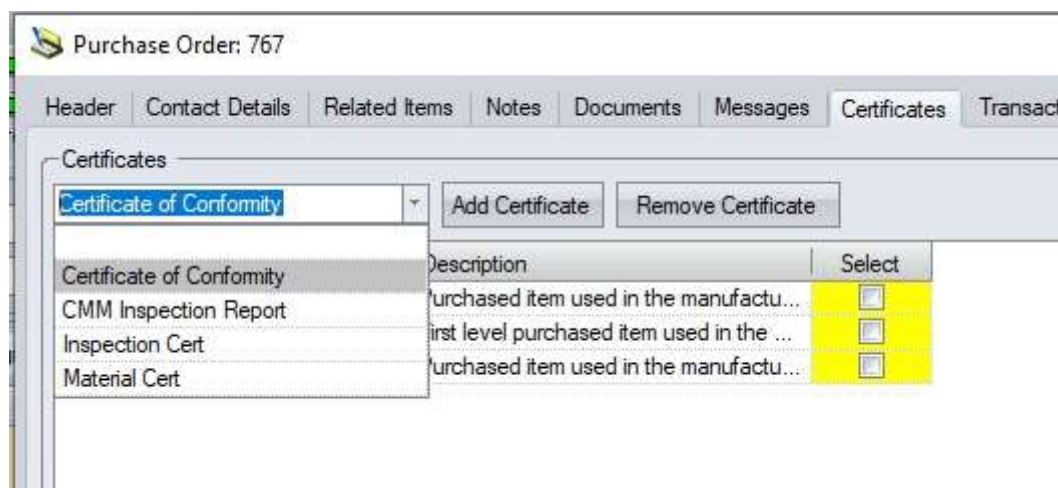
The user will still create the order as they usually would (i.e. via *PO Shortage* screen, raise manually, etc.) so the items required are listed on the order. Once the order has been created, the user can then add the certification requirements to the line items via the *Certificates* tab. Initially, the items will be listed with no certification requirements as shown below.



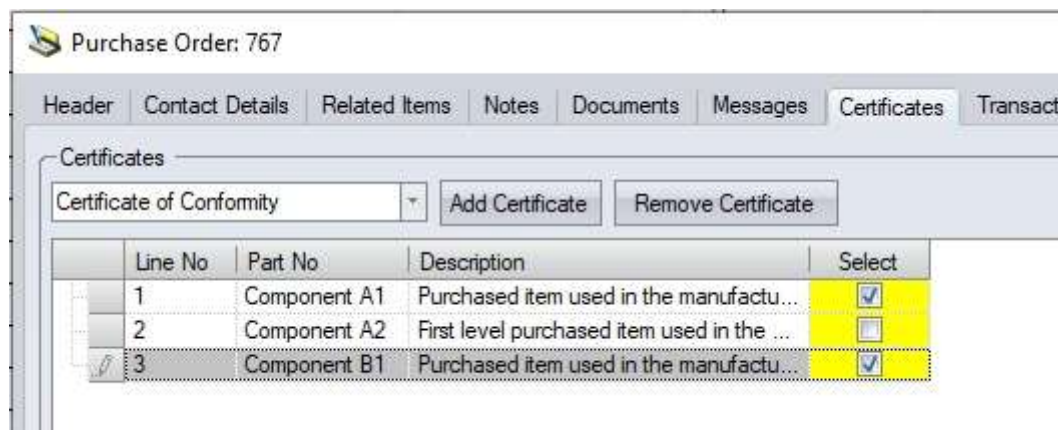
The user can add certification requirements to individual order lines, or to all lines using the SELECT option to indicate the order lines the certification is to be added to.

Adding Certificates to Order Lines

The user can add certification requirements to the order lines by selecting the certificate required from the drop-down list, and then ticking the SELECT option against the order lines that require it. The user can select individual order lines, or click the column header to select them all.



(Selecting the certification required)



(Selecting individual order lines)

Purchase Order: 767

Header Contact Details Related Items Notes Documents Messages Certificates Transactions

Certificates

Certificate of Conformity Add Certificate Remove Certificate

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input checked="" type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input checked="" type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input checked="" type="checkbox"/>

(Selecting all order lines)

Once the order lines have been selected, the user can click the ADD CERTIFICATE option to add the certificate requirement to all the selected order lines. This will update the grid with the selected certificate against the selected order lines.

Purchase Order: 767

Header Contact Details Related Items Notes Documents Messages Certificates Transactions

Certificates

Certificate of Conformity Add Certificate Remove Certificate

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>
Certificate		Received	
Certificate of Conformity			<input type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
Certificate		Received	
Certificate of Conformity			<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>
Certificate		Received	
Certificate of Conformity			<input type="checkbox"/>

The user can repeat this process for all additional certificates required by the order lines.

Purchase Order: 767

Header Contact Details Related Items Notes Documents Messages Certificates Transactions

Certificates

CMM Inspection Report Add Certificate Remove Certificate

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input checked="" type="checkbox"/>
Certificate		Received	
Certificate of Conformity			<input type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>

Purchase Order: 767

Header Contact Details Related Items Notes Documents Messages Certificates Transactions

Certificates

CMM Inspection Report Add Certificate Remove Certificate

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>

Certificate	Received
Certificate of Conformity	<input type="checkbox"/>
CMM Inspection Report	<input type="checkbox"/>

Line No	Part No	Description	Select
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>

Once the user has added all the required certificates, they can click the ACCEPT option to save the requirements.

Removing Certificates from Order Lines

The user can remove certificates from order lines in much the same way as they add them, selecting the certificate to be removed from the drop-down list and selecting the order lines its to be removed from. Once selected, clicking the REMOVE CERTIFICATE option will remove the certification requirement from the selected order lines.

Purchase Order: 767

Header Contact Details Related Items Notes Documents Messages Certificates Transactions

Certificates

Certificate of Conformity Add Certificate Remove Certificate

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input checked="" type="checkbox"/>

Certificate	Received
Certificate of Conformity	<input type="checkbox"/>
CMM Inspection Report	<input type="checkbox"/>
Material Cert	<input type="checkbox"/>

Line No	Part No	Description	Select
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>

(Selecting the certificate to be removed, and the line(s) it is to be removed from)

Purchase Order: 767

Header | Contact Details | Related Items | Notes | Documents | Messages | Certificates | Transactions

Certificates

Certificate of Conformity

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>
		Certificate	Received
		CMM Inspection Report	<input type="checkbox"/>
		Material Cert	<input type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>

(Clicking REMOVE CERTIFICATE to remove the certificate from the selected lines)

Once all changes have been made, the user can click ACCEPT to save the changes to the purchase order.

Marking Certificates as Received

Once certificates have been received from the supplier, the user can update the order lines to indicate this via the *Certificates* tab on the purchase order. NOTE: This is the only place in the system this can be done.

Purchase Order: 767

Header | Contact Details | Related Items | Notes | Documents | Messages | Certificates | Transactions

Certificates

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>

To update the order lines, the user must mark the certs as "received" by ticking the RECEIVED option against each certificate on each order line. The user can use the click on the order line to expand the list of required certificates, or click the EXPAND ALL option to see all certificates across all order lines. This will display the RECEIVED option against them.

Purchase Order: 767

Header | Contact Details | Related Items | Notes | Documents | Messages | Certificates | Transactions

Certificates

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>
		Certificate	Received
		CMM Inspection Report	<input type="checkbox"/>
		Material Cert	<input type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>

(Expanding the certificate requirements of an individual order line)

Purchase Order: 767

Header | Contact Details | Related Items | Notes | Documents | Messages | Certificates | Transactions

Certificates

Material Cert

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>
Certificate			Received
CMM Inspection Report			<input type="checkbox"/>
Material Cert			<input type="checkbox"/>
2	Component A2	First level purchased item used in the ...	<input type="checkbox"/>
Certificate			Received
Certificate of Conformity			<input type="checkbox"/>
Inspection Cert			<input type="checkbox"/>
3	Component B1	Purchased item used in the manufactu...	<input type="checkbox"/>
Certificate			Received
Certificate of Conformity			<input type="checkbox"/>
Material Cert			<input type="checkbox"/>

(Expanding the certificate requirements of all order lines using the EXPAND ALL option)

The user can now mark the relevant certificates as required. The user can mark individual items as RECEIVED, or click the RECEIVED column header to tick all the listed certificates.

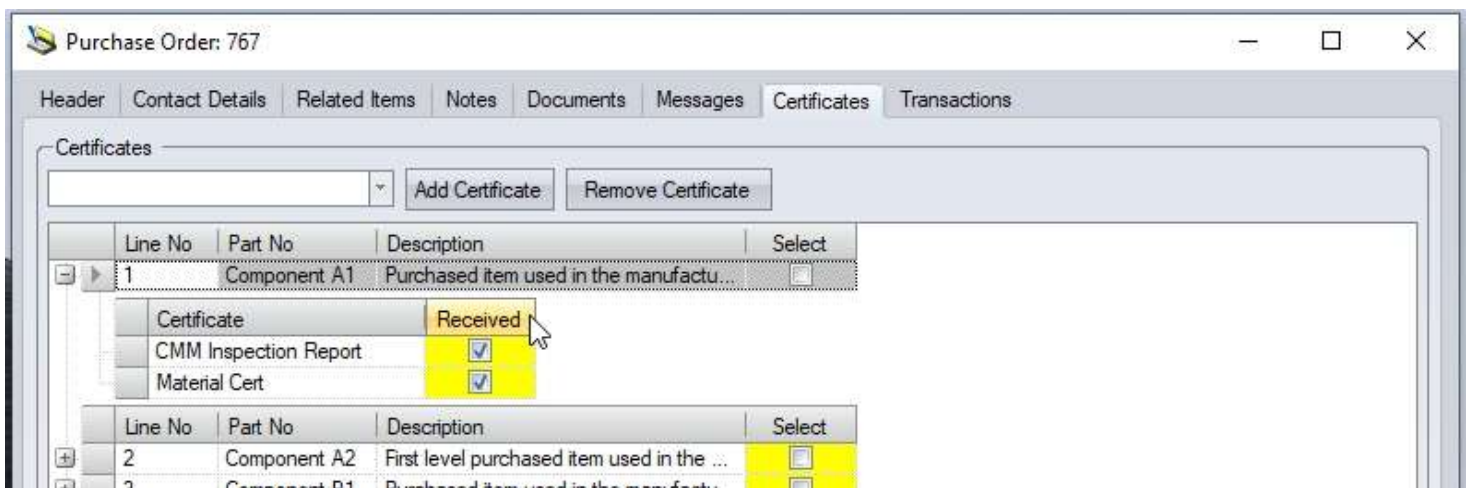
Purchase Order: 767

Header | Contact Details | Related Items | Notes | Documents | Messages | Certificates | Transactions

Certificates

Line No	Part No	Description	Select
1	Component A1	Purchased item used in the manufactu...	<input type="checkbox"/>
Certificate			Received
CMM Inspection Report			<input checked="" type="checkbox"/>
Material Cert			<input type="checkbox"/>
2	Component A2	First level purchased item used in the	<input type="checkbox"/>

(Marking individual certificates as RECEIVED)

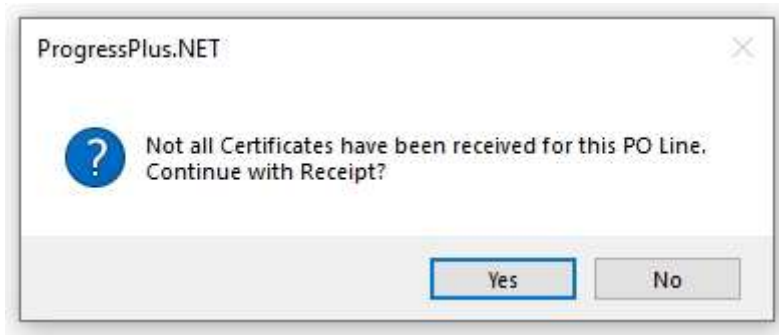


(Marking all certificates as RECEIVED)

Once the user has updated the required certificates, clicking the UPDATE CERTIFICATES will update all the selected certificates as received.

Receipt of Purchase Orders with Certification Requirements

The process of receipting the purchase orders is the same, however, the system will highlight to the user whether the expected certificates have been marked as "received". If the user is receipting a purchase order line which has not had the certificates marked as RECEIVED then the user will be informed of such via the message below.



This warning is not a hard stop, and will allow the user to proceed with the receipt of the goods, however, if the certificates MUST be received before the goods can be booked into stock, then the user should contact the purchasing department/buyer to highlight this.

Suppliers

Suppliers - Purchase Enquiries - No. Suppliers column amended to add indicator of how many suppliers have responded

Added additional information to No of Suppliers column on the PE Browse to indicate how many suppliers have responded (to at least one list of the Enquiry (Ticket 58904)

Suppliers - Purchase Enquiries - Additional filter added for PE status

Added additional status filters to the PE Browse (Ticket 58905)

Purchase Enquiries

New View Refresh Print Export Grid Options

Grid Filters

Enquiry No : Supplier : Clear Save

Our P/N : 13/11/2023 AND 13/11/2024

Our P/N :
P/N Desc :
Department :
Reference :
Status :
Status <= :
Status >= :
Entered by :

Reference	Department	No Suppliers	Entered By	Entered Date	Required Date
Top Ten	Top Ten	2 (2)	Harry Hodgson	11/11/2024	11/11/2024
Top Ten	Top Ten	2 (2)	Harry Hodgson	11/11/2024	11/11/2024
Top Ten	Top Ten	1 (0)	Harry Hodgson	11/11/2024	11/11/2024
Top Ten	Top Ten	1 (1)	Harry Hodgson	11/11/2024	15/11/2024

Suppliers

Suppliers - Purchase Enquiries - Additional column added to Pick Parts screen for SC POs to show operation description
Added Op Instructions column to Pick Parts for Subcon PEs (Ticket 58912)

Purchasing

New View Refresh Print Print Range Email Range PO Shortage **SC Shortage** SC Despatch Overview PO Expedite Export Grid Options

Raise Purchase Order(s) for Sub Contract Shortages

Grid Filters

WO No : Supplier ID : Refresh

Our P/N : 18/11/2024 Clear Save

☒ Previous Routing Op Complete ☐ Previous Routing Qty Bkd ☒ Reqd Date = Today + Lead Time OP Sched Start Date Passed Closed Supplier

☒ Works Order Status < TQR ☐ Works Order Status < Complete

WO No	Master WO	Part No	Description	Project	WO Sched Start	OP Sched Start	Op No	Op Description	Op Instruction
2825	2825	040178	Down Pipe - 75mm M...		02/11/2023	02/11/2023	20	Heat Treat As Per Inst...	Heat treat to 65Rc and temper

Suppliers

Suppliers - Purchase Requisitions - Line NET total added

Purchase Requisitions - Added line net total – Ticket 61300 (14/08/2024 8:51)

Purchase Requisition: 49

Header | Related Items | Notes | Documents | Messages | Transactions

Header Information

Requisition No: 49

Sub Contract: ☐ Rev.

Raised Date: 01/08/2023

Raised By: Matthew Gilmour ☒ Approved

Status: Complete

Requested By: Matthew Gilmour

Department:

Suppliers

User Defined Fields

Supplier Name	Contact
Fulton Machining Ltd	Robert Fulton

Line Details

Line No	Part No	Supplier PN	Description	Part Rev	Quantity	UOP	Unit Price	(%)	Disc/Surcharge	Net Total
1	CP-39393		Component Part 1		8.00	each	40.00	0.00	Discount	320.00

Suppliers

Suppliers - PO Expedite - Can now sort grid by clicking on column headings

PO Expedite form: - Grid can be sorted by clicking column headers – Ticket 61544 (16/08/2024 10:08)

Purchasing

New | View | Refresh | Print | Print Range | Email Range | PO Shortage | SC Shortage | SC Despatch | Overview | **PO Expedite** | Export | Grid

Grid Filters

PO No :

Our P/N :

Drag a column

PO No : 18/11/2024 AND 18/11/2024

PO Date to Use ☒ Required Date ☐ Promised Date ☐ Latest Date ☐ Exclude On Hold

	PO/Line	Subcon	Status	Supplier	Contact	Email	Depart
<input type="checkbox"/>	1221/1	<input type="checkbox"/>	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	Top Te
<input type="checkbox"/>	1159/1	<input type="checkbox"/>	Entered	Banner Metals & Fixin...	Graham Prentice		Branch
<input type="checkbox"/>	1156/1	<input type="checkbox"/>	Entered	Banner Metals & Fixin...	Wilson Harris	wilsonpharris@outloo...	
<input type="checkbox"/>	1160/1	<input type="checkbox"/>	Entered	Banner Metals & Fixin...	Wilson Harris	wilsonpharris@outloo...	
<input type="checkbox"/>	1163/1	<input type="checkbox"/>	Entered	Banner Metals & Fixin...	Wilson Harris	wilsonpharris@outloo...	
<input type="checkbox"/>	1164/1	<input type="checkbox"/>	Entered	Banner Metals & Fixin...	Wilson Harris	wilsonpharris@outloo...	
<input type="checkbox"/>	1151/1	<input type="checkbox"/>	Entered	Cromwell Tools Ltd		infor@cromwell.co.uk	

Suppliers

Suppliers - Purchase Orders - Acknowledgment No. column added to main Purchasing Browse grid

Purchasing Browse: - added Acknowledgement No to Browse grid – Ticket 62096 (30/08/2024 13:45)

Purchasing

New View Refresh Print Print Range Email Range PO Shortage SC Shortage SC Despatch Overview P

Grid Filters

PO No : [] Supplier : [] Clear Save

Our P/N : [] 13/11/2023 AND 13/11/2024

Drag a column header here to group by that column.

PO No	Revision	Reqn No	Supplier	POMethod	Acknowledgement No	Department	Net Value
1223			Banner Metals & Fixings Ltd	Portal	BAN1320	Top Ten	583.50
1222			Banner Metals & Fixings Ltd	Portal	BAN1310	Top Ten	624.00
1221			Banner Metals & Fixings Ltd	Portal	BAN1300	Top Ten	495.00

Suppliers

Suppliers - Purchase Orders - Warning if PO line quantity change results in change of price

Purchase Orders: - If the quantity is changed on a saved PO line and the change updates the Unit Price a warning message is displayed to show the price change. – Ticket 57342 (22/10/2024 9:14)

Purchase Order: 1225

Header Contact Details Related Items Notes Documents Messages Transactions

Header Information

Purchase Order No: 1225 Rev: [] Order Date: 20/11/2024 Quote No: []

Supplier Account: BAN001 Submitted: [] Reqn No: []

Approved: [x] Banner Metals & Fixings Ltd Sub Contract: [] Method: []

Currency/Rate: Sterling 1.0000 Update Confirmation: [] Department: Top Ten

Buyer: Harry Hodgson Acknowledgement No: [] Standard: ISO Approval Pending

Approve By: [] Exported: [] Proforma: [] Proforma Paid: []

Line Details

PN	Description	UOP	Part Rev	Status	Qty Req	Unit Price	Net Total	Date Req	Date
120	End Cap	each	D	Entered	200	12.50	4,400.00	31/12/2024	31/1

ProgressPlus.NET

Unit Price has been updated from 45.00 to 12.50.

OK

Purchase Order Totals

Net* £4,400.00

VAT £880.00

Total £5,280.00

IM Menu Print Accept Close

Suppliers

Suppliers - PI Matching - Transaction recorded when PI transferred to accounts

Added transaction history against transferring a SI or PI from the accounts transfer form - Ticket 65868 (05/12/2024 13:27)

Date/Time	Transaction Type	User Name	Related Item(s)	Details
26/02/2025 17:17:19	PurchaseInvoiceEdited	developer	PurchaseInvoice: 459	Transferred from the Accounts Transfer Screen. Accounts Mark as Transferred
26/02/2025 17:13:54	PurchaseInvoiceLineCreated	AndrewH	GRNLine: 9835/4; PartNo: Motor Gear 1; POLine: 1810/4; PurchaseInvoiceLine: 459/4; Supplier: RSCComm	Qty = 50.000000, GRN Unit Cost = 1.000000, PO Line Completed = True

Suppliers

Supplier – Purchase Enquiry – New menu options to update price matrix and op default supplier on subcontract operations

On the Supplier Feedback for PEs, added Update Price matrix and Op Default Supplier menu options Ticket 66189 – (07/01/2025 12:50)

Additional Cost	Disc/Surcharge	Surcharge	Total Price	Total Last ...	Convert	VAT Rate	Lead Time	Ref Supplier	WONo	Update Price Matrix	Update Purchase Cost	Update Preferred Supplier
0.00	10.00		61.25	63.00		0.0000	7	FAR001	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0.00	10.00		68.00	63.00		0.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	10.00		70.25	63.00		0.0000	14	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		52.50	63.00		20.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		77.50	63.00		20.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		87.50	63.00		20.0000	14	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		57.00	63.00		20.0000	14	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		67.50	63.00		20.0000	14	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		71.00	63.00		20.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		152.50	112.00		0.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		120.00	112.00		20.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		112.00	112.00		20.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		202.00	206.00		0.0000	14	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		220.00	206.00		20.0000	14	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0.00	0.00		240.00	206.00		20.0000	7	FAR001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			1,659.00	1,521.00								

Suppliers

Suppliers - PI Matching - Update Costs tab now enabled when PI is saved, and also after PI has been transferred

PI Match: - Update Costs: - Tab enabled after Accept clicked and if transferred to accounts - Ticket 68413 (28/03/2025 11:08)

Update Costs

NOTE: This tab is only available on purchase invoice credits and only becomes available after the credit have been saved and assigned a purchase invoice number.

This section of the purchase invoice screen allows the user to amend the associated part number's purchasing cost as well as the stock value of any GRNs associated with the purchase invoice. This screen is to allow the user to amend the value of the part and/or stock based on the credited value.

Purchase Invoice Match: 131

Header Update Costs Line 1 Related Items Notes Documents Messages Transactions

Purchasing and GRN Costs

Current Purchasing Cost New Purchasing Cost

GRN/Line	Part No	Unit Cost	New Unit Cost
7046/1	Color A	9.99	9.99

Update Costs

IM Menu Accept Close

The user can update the part's purchasing cost value using the NEW PURCHASING COST field.

Purchasing and GRN Costs

Current Purchasing Cost New Purchasing Cost

The user can also update the value of all associated receipts, which are listed in the grid below, using the NEW UNIT COST field.

GRN/Line	Part No	Unit Cost	New Unit Cost
7046/1	Color A	9.99	9.99

Once any changes have been made, the user can click the UPDATE COSTS option to apply the changes.

Purchasing and GRN Costs

Current Purchasing Cost New Purchasing Cost

GRN/Line	Part No	Unit Cost	New Unit Cost
7046/1	Color A	9.99	10.00

(Example showing updated purchasing cost and GRN unit value)

GRN History Form - 7046/1

GRN Details

Part No: Description: Conv Qty:

Group Code: UOM: UOP: GRN Date Received:

History | Documents | **Stock Receipt Edit** | Related Items | Stock Movement

Location: Date Received: Late Reason:

Batch No: Weight: Requires Release: ☐

Unit Cost: Revision: Customer Return Credit: ☐

Advice Note:

Notes

GRN Note:

User Defined Fields

Serial Nos:

(Updated GRN unit cost)

Part No: Color A

Part Details | More Details | BOM | Routing | **Costing** | Price Matrix | Stock Status | Related Items | Notes | Documents | Messages

Contract Costing

Material Cost: Sundry Cost: Sub-Con Cost: Set Up Cost: Labour Run Cost:

Costs/Margin

Standard Cost: Each Last Updated: Purchasing Cost: Each Selling Price: Each MOQ WO: Each

Quick Batch Calculator

Qty to Make: Calculate * Base Standard on MOQ WO ☐

	Unit	Total	Unit	Total
Material Cost	£0.0000	£0.0000	£0.0000	£0.0000
Labour Cost	£0.0000	£0.0000	£0.0000	£0.0000
Sub-Con Cost	£0.0000	£0.0000	£0.0000	£0.0000
Total	£0.0000	£0.0000	£0.0000	£0.0000
% Margin		0.00		0.00

Apply to Standard Cost Set Standard Cost to £0.0000 and MOQ WO to 0.00

(Updated purchasing cost)

Suppliers

PO Expedite form: Show Late POs in Red – Ticket 67713 (26/02/2025 14:29)

PO Expedite

Grid Filters

Supplier ID: 04/06/2025 AND 04/06/2025 Refresh Clear

PO Date to Use: ☒ Required Date ☐ Promised Date ☐ Latest Date ☒ Exclude On Hold

	PO/Line	Subcon	Status	Supplier	Contact	Email	Due Date	Part No	Description
<input type="checkbox"/>	1231/2	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	24/01/2025	DC6688	Coupling Inserts
<input type="checkbox"/>	1243/1	<input type="checkbox"/>	Part Received	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
<input type="checkbox"/>	1244/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
<input type="checkbox"/>	1245/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
<input type="checkbox"/>	1246/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
<input type="checkbox"/>	1247/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	04/02/2025	EC120	End Cap
<input type="checkbox"/>	1248/2	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	14/02/2025	EC120	End Cap
<input type="checkbox"/>	1249/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	19/03/2025	EC120	End Cap
<input type="checkbox"/>	1250/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	31/03/2025	EC120	End Cap
<input type="checkbox"/>	1251/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	23/05/2025	EC120	End Cap
<input type="checkbox"/>	1252/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	23/05/2025	EC120	End Cap
<input type="checkbox"/>	1253/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Bruce Banner	brucebanner1969@o...	27/06/2025	EC120	End Cap
<input type="checkbox"/>	1159/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Graham Prentice		22/03/2024	SSRB-303-08-0004	Stainless Steel Round Bar ...
<input type="checkbox"/>	1156/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Wilson Hamis	wilsonphamis@outloo...	12/07/2024	050323	A/F Meter Mild Steel (Heat ...
<input type="checkbox"/>	1160/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Wilson Hamis	wilsonphamis@outloo...	05/05/2024	040202	Down Pipe - 80mm Stainles...
<input type="checkbox"/>	1163/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Wilson Hamis	wilsonphamis@outloo...	07/05/2024	060045	O2 Sensor Boss (For use wi...
<input type="checkbox"/>	1164/1	<input type="checkbox"/>	Entered	Banner Metals & Fxin...	Wilson Hamis	wilsonphamis@outloo...	28/06/2024	060045	O2 Sensor Boss (For use wi...

Suppliers

Suppliers - PI Matching - Purchasing Cost validation/update now done on PI save instead of on PI creation only

PI Matching - Carry out PI price check against purchasing cost on ACCEPT and not just at PI Creation - Ticket 69407

(09/05/2025 15:08)

(New Purchase Invoice Match)

Header | Update Costs | Related Items | Notes | Documents | Messages | Transactions

Header Information

PI Match No: (Next Available) Invoice Type: Invoice

Invoice Date: 09/07/2025 Document No: 1234

Supplier Account: AAL002 Invoiced By: Harry Hodgson

Aalco Ltd (North) Contact Name: James McCaig

Currency/Rate: Sterling 1.0000 Department: Nominal Code:

Line Details

UOP	Qty Req'd	Qty Rec'd	Qty Ret'd	Inv To Date	Inv Qty	Unit Price	Net Total	Status	Invoice	Complete P
Each	5.00	0.00	0.00	0.00	0.00	2.90	0.00	Entered		
Each	2.00	0.00	0.00	0.00	0.00	160.00	0.00	Entered		
Each	1.00	0.00	0.00	0.00	0.00	10.00	0.00	Entered		
Each	4.00	0.00	0.00	0.00	0.00	2.50	0.00	Entered		
Each	10.00	10.00	0.00	0.00	10.00	15.00	150.00	Entered		
Each	1.00	0.00	0.00	0.00	0.00	40.00	0.00	Entered		

ProgressPlus.NET

The PO Unit Price is different to the Inventory Purchasing Cost for PI Line(s). 5, Purchasing Cost 10.00. Do you wish to Update Purchasing Cost?

Yes No

PI Matching Totals

Net: 150.00

VAT: 30.00

Total: 180.00

Accept Close

Purchase Invoice Match: 494

Header | Update Costs | Related Items | Notes | Documents | Messages | Transactions

Header Information

PI Match No: 494 Posted to Accounts: Hide Completed PO's: Invoice Type: Invoice

Invoice Date: 09/07/2025 Document No: 1234

Supplier Account: AAL002 Invoiced By: Harry Hodgson

Aalco Ltd (North) Contact Name: James McCaig

Currency/Rate: Sterling 1.0000 Department: Nominal Code:

Line Details

Supplier PN	Description	UOP	Qty Req'd	Qty Rec'd	Qty Ret'd	Inv To Date	Inv Qty	Unit Price	Net Total	S
	FRP purchas...	Each	10.00	10.00	0.00	10.00	10.00	14.50	145.00	E

ProgressPlus.NET

The PO Unit Price is different to the Inventory Purchasing Cost for PI Line(s). 1, Purchasing Cost 10.00. Do you wish to Update Purchasing Cost?

Yes No

User Defined Fields

Internal Reference

PI Approved By

Project Title

SO Part Status

Totals

145.00

29.00

Total: 174.00

Accept Close

Section – Inventory

wInventory

Inventory - Stock Check - Additional column added for Qty Allocated. Screen also checks to ensure new stock quantity is not less than allocated quantity.

Added additional column on the Stock Check screen for Qty Allocated. Added validation on the Qty column to check if the quantity being edited is less than the Qty Allocated (if there is an allocation) and if it is then stop the user - Ticket 57708 (25/07/2024 14:08)

Stock Check

Grid Filters

Our P/N :
Group Code :

Location :
18/11/2024 AND 18/11/2024

Refresh
Clear

Results

GRN No	Line No	Part	Location	Qty Left	Qty Allocated	GRN Unit Cost
3146	9	009223		12.00		£210.378004
3169	20	009223		30.00		£149.441352
3303	1	009223		27.00		£369.220806
3305	1	009223		11.00		£363.574972
3286	1	035011		1.00		£17.0408
3498	1	035011		6.00		£155.0408
3516	1	035011		1.00		£155.0408
3521	1	035011		2.00		£0.528664
1742	20	035016	Support Pi... Sales A Stores	3	5.00	£0.34527
2817	1	035016	Support Pi... Sales A Stores	3.00		£0.343001
2847	3	035016	Support Pi... Sales A Stores	4.00		£0.348319

ProgressPlus.NET

!

Qty Left cannot be less than the Allocated Qty

OK

Inventory

Inventory - Stock Status tab - Available Stock column added to ACTIVE stock grid

Part Details > Stock Status > Active Stock:- add "Available Stock" column, so users can see how much of the active stock is actually free (30/07/2024 16:52)

Part No: EC120

Messages

Transactions

Stock Movement

Part Details

More Details

BOM

Routing

Costing

Price Matrix

Stock Status

Related Items

Notes

Documents

Supply:

Active 40.00 (30.00)

On Order (PO) 10.00

On Order (WO) 40.00

Forecast (WO) 0.00

Demand: Min Stock Level 150.00

On Order (SO) 40.00

Required for WO 0.00

Reorder Forecast WO 0.00

Active Stock

Location	GRN/Line	Received	Batch No	Qty	Available Stock
Stores	3551/1	13/11/2024		10.00	10.00
Stores	3548/1	13/11/2024		10.00	10.00
Stores	3549/1	13/11/2024	2840/2	20.00	20.00

Inventory

Tools - Transaction History - Additional transactions recorded for changes to supplier, customer and inventory price matrices

Inventory/Customer/Supplier Price Matrix - Transaction History: Added transactions to record changes in Price Matrix records, which cover the following: - changes made via Inventory Detail, Customer Detail, or Supplier Detail screens (including copying from another part or account).- Inventory Price Matrix Import.- Customer Price Matrix records created from Sales Enquiries.- Supplier Price Matrix records created/updated from Purchase Enquiry Supplier Feedback - Tickets 9480 and 60363 (08/08/2024 18:58)

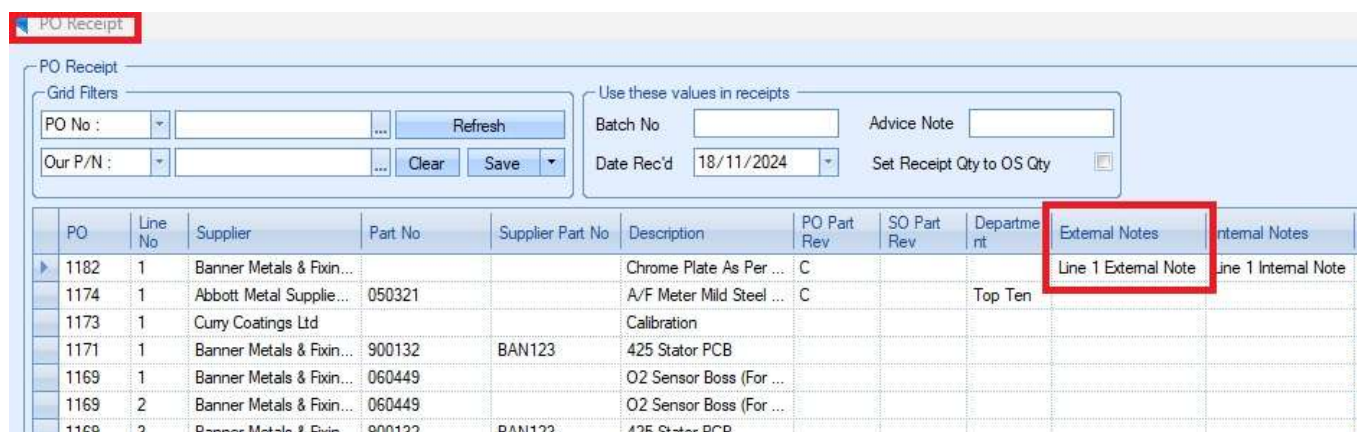


Date/Time	Transaction Type	User Name	Related Item(s)	Details
18/11/2024 13:52:17	PriceMatrixEdited	HanyH	PartNo: EC120; Supplier: BAN001	Part No EC120 / Supplier Account BAN001 Price Matrix Record created from Purchase Enquiry No 442: Part No=EC120, Account=BAN001, Type=S, Range=Up To, Qty=10: Currency= Sterling, Price=56.5, Discount=10%, Net...
18/11/2024 13:50:54	PriceMatrixEdited	HanyH	PartNo: EC120	Part Number EC120 Supplier Price Matrix Edited: Records Added: Part No=EC120, Account=< STANDARD >, Type=S, Range=Up To, Qty=200: Currency= Sterling, Price=12.5, Discount=0%, Net=12.5, Last Updated=18/11/2024, Notes...

Inventory

Inventory - PO Receipts - PO line EXTERNAL note added to the PO Receipt screen

PO Receipt screen - Added PO line External notes – Ticket 61545 (16/08/2024 11:29)



PO	Line No	Supplier	Part No	Supplier Part No	Description	PO Part Rev	SO Part Rev	Department	External Notes	Internal Notes	\$
1182	1	Banner Metals & Fixin...			Chrome Plate As Per ...	C			Line 1 External Note	Line 1 Internal Note	0
1174	1	Abbott Metal Supplie...	050321		A/F Meter Mild Steel ...	C		Top Ten			0
1173	1	Curry Coatings Ltd			Calibration						0
1171	1	Banner Metals & Fixin...	900132	BAN123	425 Stator PCB						0
1169	1	Banner Metals & Fixin...	060449		O2 Sensor Boss (For ...						0
1169	2	Banner Metals & Fixin...	060449		O2 Sensor Boss (For ...						0
1169	3	Banner Metals & Fixin...	900132	BAN123	425 Stator PCB						0

Inventory

Part Detail: - Stock Movement: - Batch number added to Stock Movement screen. – Ticket 62429 (07/10/2024 9:40)

Part No: EC120

Part Details | More Details | BOM | Routing | Costing | Price Matrix | Stock Status | Related Items | Notes | Documents

Stock Movement

Display: This Month

* Quarantine Issues and Receipts do not affect the Balance.

Date	GRN/Line	Batch No	Type	Description	Quarantine	Issues	Receipts	Balance
06/11/2024	3546/18		IMPORT	Stock Import		10.00		188.00
06/11/2024	3546/19		IMPORT	Stock Import		10.00		178.00
06/11/2024	3546/20		IMPORT	Stock Import		10.00		168.00
06/11/2024	3546/21		IMPORT	Stock Import		10.00		158.00
06/11/2024	3546/22		IMPORT	Stock Import		5.00		153.00
06/11/2024	3546/23		IMPORT	Stock Import		10.00		143.00
06/11/2024	3546/24		IMPORT	Stock Import		10.00		133.00
06/11/2024	3546/25		IMPORT	Stock Import		10.00		123.00
06/11/2024	3546/26		IMPORT	Stock Import		10.00		113.00
06/11/2024	3546/27		IMPORT	Stock Import		20.00		93.00
06/11/2024	3546/28		IMPORT	Stock Import		20.00		73.00
06/11/2024	3546/29		IMPORT	Stock Import		10.00		63.00
06/11/2024	3546/30		IMPORT	Stock Import		15.00		48.00
06/11/2024	3546/31		IMPORT	Stock Import		10.00		38.00
06/11/2024	3546/32		IMPORT	Stock Import		10.00		28.00
06/11/2024	3547/1	2851/1	IMPORT	Stock Import		2.00		26.00
06/11/2024	3547/2	2849/1	IMPORT	Stock Import		2.00		24.00
06/11/2024	3547/3	2844/1	IMPORT	Stock Import		2.00		22.00
06/11/2024	3547/4	2842/1	IMPORT	Stock Import		2.00		20.00
06/11/2024	3547/5	2841/1	IMPORT	Stock Import		10.00		10.00
06/11/2024	3543/1	2840/1	WRITE_OFF	Write Off		10.00		0.00
13/11/2024	3548/1		PO_REC	PO Receipt from PO 1223/1			10.00	10.00
13/11/2024	3549/1	2840/2	WO_REC	WO Receipt from WO 2840			20.00	30.00
13/11/2024	3551/1		PO_REC	PO Receipt from PO 1222/1			10.00	40.00
TOTALS						565.00	413.00	

IM Menu Print Accept Close

Inventory

Inventory Detail - Sales Prices Tab: - Revamp of the Sales Prices tab layout, to make the text boxes bigger to allow the user to see large numbers with a high number of decimal points properly - Ticket 63523 (24/10/2024 16:23)

Part No: FRP-12345

Messages | Transactions | Stock Movement

Part Details | More Details | BOM | Routing | Sales Prices | Costing | Price Matrix | Stock Status | Related Items | Notes | Documents

Quote Qty: 10.00

Quote Qty: 10.00 Price Per Item: £250.00

Save Qty Delete Qty

Cost % Breakdown

Mat	Sub	Lab	Tot
£150.00	£850.00	£0.00	£1,000.00
15.00%	85.00%	0.00%	100.00%

Quantity/Time Cust. Defaults Default Prices

Material & Subcontract Content

Sundry Cost: £0.00

0.00 % Sundry Mark-Up: £0.00

Material Cost: £150.00

Apply G/C Mark-Ups G/C Mark-Up Breakdown

0.00 % Material Mark-Up: £0.00

Subcontract Cost: £850.00

Apply Subcon Mark-Ups S/C Mark-Up Breakdown

0.00 % Subcon Mark-Up: £0.00

Material Content Total: £1,000.00

Material Content per Item: £100.00

Labour Content

Labour Cost: £0.00

Labour Cost at Sales Rate: £0.00

Lab at Sales Rate per Hour: £0.00

Amend Labour Cost: £0.00

Amend Lab Cost per Hour: £0.00

Apply W/C Mark-Ups W/C Mark-Up Breakdown

0.00 % Labour Mark-Up: £0.00

Labour Content Total: £0.00

Labour Content per Item: £0.00

Lead Time (Days): 30

Overhead Mark-Up & Return per Hour

Nett Cost: £1,000.00

0.00 % Overhead: £0.00

Total after Overhead: £1,000.00

Total after O/H per Item: £100.00

Return per Hour: £0.00

Profit Mark-Up & Prices

Target Profit: 0.00% £0.00

Actual Profit: 150.00% £1,500.00

Gross Profit: 150.00% £1,500.00

Suggested Price Total: £1,000.00

Suggested Price per Item: £100.00

Selling Price Total: £2,500.00

Selling Price per Item: £250.00

Discount: 0.00% 2,500.00 per Item 250.00

Price Break

Stamp Library

IM Menu Print Accept Close

Inventory

Inventory - Stock Check - Additional date filters added for part and GRN issue date

Added additional date filters for Part/GRN Last Issued Date on the Stock Check Screen - Ticket 65447 (26/11/2024 11:56)

Stock Check

Grid Filters

Our P/N : Location : Refresh

Group Code : 02/04/2025 AND 02/04/2025 Clear

Results

GRN No	Line No	Part No	Description	Group	Batch No	Qty Left	Qty Allocated	GRN U
3146	9	0092233-3...	LED Circuit...	Sales		10.00		£210
3169	20	0092233-3...	LED Circuit...	Sales		30.00		£149
3303	1	0092233-3...	LED Circuit...	Sales		27.00		£369
3305	1	0092233-3...	LED Circuit...	Sales		11.00		£363
3185	1	035011	Support Pi...	Sales		1.00		£5
3286	1	035011	Support Pi...	Sales	A Stores	1.00		£
3498	1	035011	Support Pi...	Sales	A Stores	6.00		£1
3516	1	035011	Support Pi...	Sales	A Stores	1.00		£1
3521	1	035011	Support Pi...	Sales	A Stores	2.00		£0
1742	20	035016	Support Pi...	Sales	A Stores	159.00	6.00	£
2817	1	035016	Support Pi...	Sales	A Stores	6.00		£0
2847	3	035016	Support Pi...	Sales	A Stores	4.00		£0
3478	1	040138	Down Pipe...	Sales - Auto...	A Auto Bo...	6.00		
3500	1	040142	Down Pipe...	Sales - Auto...	A Auto Bo...	6.00		
3169	17	040178	Down Pipe...	Sales - Auto...	A Auto Bo...	6.00		£1
3511	1	040178	Down Pipe...	Sales - Auto...	A Auto Bo...	8.00		£95
3487	1	040183	Down Pipe...	Sales - Auto...	A Auto Bo...	6.00		
3147	1	040201	Down Pipe...	Sales - Auto...	A Auto Bo...	6.00		
3491	1	040201	Down Pipe...	Sales - Auto...	A Auto Bo...	4.00		

Qty Left > 0 Include Obsolete Grid Options

Only update where checked date has been entered

****NOTE: Checked Date on all rows will be updated on Import** Import Close

Inventory

Inventory - Transfers - Additional filter added for stock category, and also ability to use % wild card in search

Inventory Transfers: - Added Wildcard search and Stock Category filter - Ticket 65539 (19/11/2024 15:40)

Inventory Transfers

Grid Filters

Our P/N : GRN No : Clear Refresh

Our P/N :
GRN No :
Location :
Group Code :
Stock Category :

Number	Description	Batch No	Qty Held	Free Qty	Location	Transfer Qty	Transfer Loc
	End Cap	2859/1	10.00	10.00	Electronic Shelf	0.00	
	End Cap		9.00	9.00	Stores	0.00	
3586/1	EC120		9.00	9.00	Stores	0.00	
3584/1	EC120		10.00	10.00	Stores	0.00	
3583/1	EC120		10.00	10.00	Stores	0.00	

Inventory Transfers

Grid Filters
 Our P/N : **%EC%** GRN No :

Results

GRN/Line	Part Number	Description	Batch No	Qty Held	Free Qty	Location	Transfer Qty	Transfer Loc
3589/1	EC120	End Cap	2859/1	10.00	10.00	Electronic Shelf	0.00	
3587/1	EC120	End Cap		9.00	9.00	Stores	0.00	
3586/1	EC120	End Cap		9.00	9.00	Stores	0.00	
3584/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3583/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3582/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3580/1	EC120	End Cap		13.00	13.00	Stores	0.00	
3572/1	EC120	End Cap		9.00	9.00	Stores	0.00	
3572/2	EC120	End Cap		1.00	1.00	Modula	0.00	
3571/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3570/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3569/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3568/1	EC120	End Cap		10.00	10.00	Stores	0.00	
3563/1	EC120	End Cap	123	2.00	2.00	Stores	0.00	
3554/2	EC120	End Cap		99.00	97.00	Stores	0.00	
3551/1	EC120	End Cap		10.00	0.00	Stores	0.00	
3549/1	EC120	End Cap	2840/2	20.00	20.00	Stores	0.00	
3254/1	ECJ-1VB1E104K	Capacitor, 0.1 uF, 25V, XR7		195.00	195.00	Stores	0.00	

Inventory

Inventory - Stock Check - Additional filter added for part description

Added Part Description as filter on Stock Check Screen - Ticket 66130 (17/12/2024 17:36)

Stock Check

Grid Filters
 P/N Desc : **Support** Location :
 Group Code : 02/04/2025 AND 02/04/2025

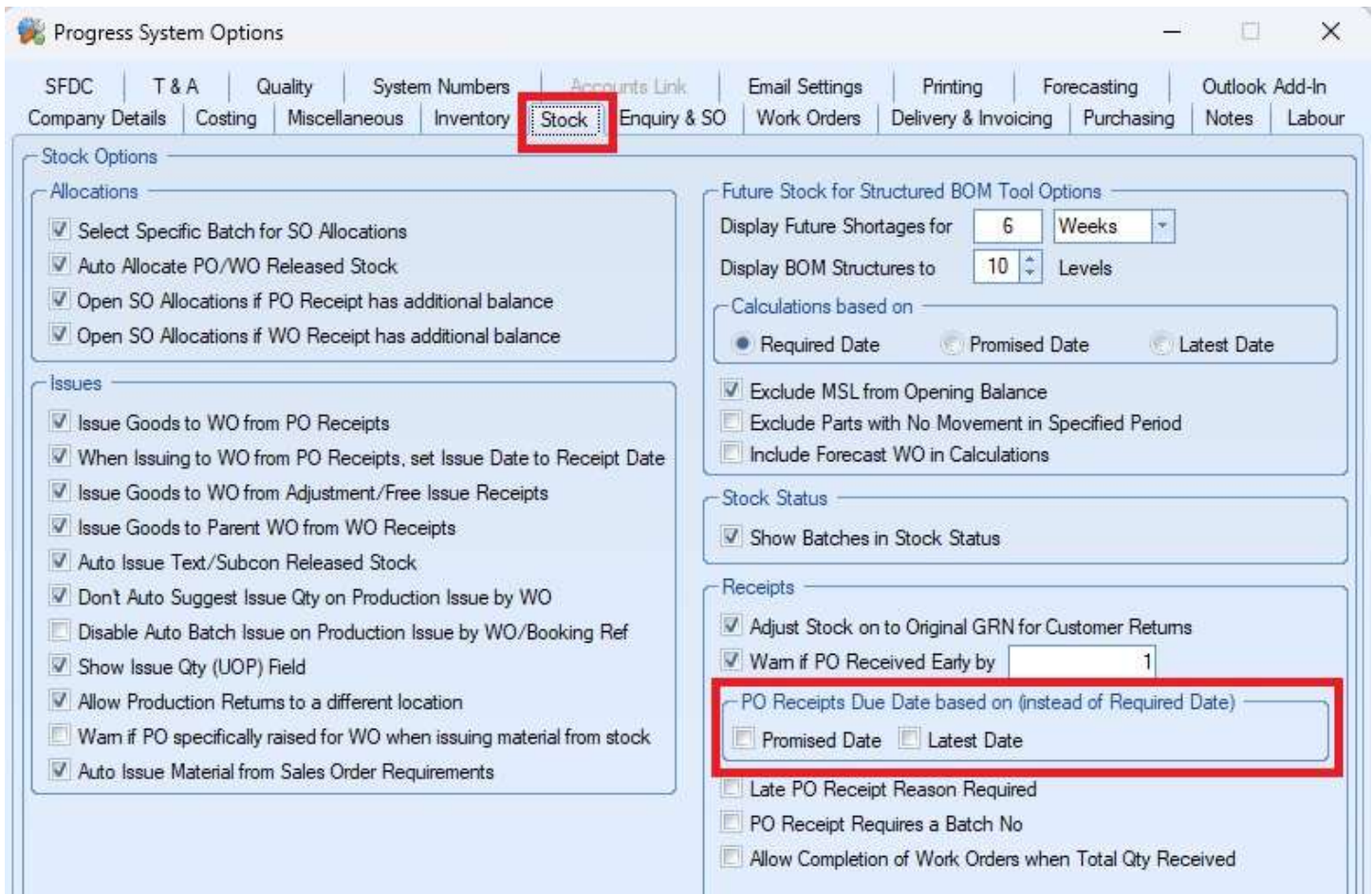
Results

GRN No	Line No	Part No	Description	Group Code	Category	Location	Batch No	Qty Left	Qty Allocated	GI
3185	1	035011	Support Pin 60...	ales	A	Stores	2386/1	1.00		
3286	1	035011	Support Pin 60...	ales	A	Stores	2571/1	1.00		
3498	1	035011	Support Pin 60...	ales	A	Stores	2354	6.00		
3516	1	035011	Support Pin 60...	ales	A	Stores	478	1.00		
3521	1	035011	Support Pin 60...	ales	A	Stores	2766/1	2.00		
1742	20	035016	Support Pin 80...	ales	A	Stores	987/1	159.00	6.00	
2817	1	035016	Support Pin 80...	ales	A	Stores	1971/1	6.00		
2847	3	035016	Support Pin 80...	ales	A	Stores	2068/1	4.00		
		325243D	Heater Support ...	ales	A	Stores				
		5325-06	Radiator Suppor...	ales - Brac...		Stores				
		5325-09	Radiator Suppor...	ales - Brac...		Stores				
		5325-11	Radiator Suppor...	ales - Brac...		Stores				
		534908-7H	DVD Drive Sup...	Sales - Brac...		Stores				

Inventory

Inventory – PO Receipts – New system setting to allow the latest date to be used as due date.

PO Receipts: - Early Receipts can now be set to look at Latest Date as the Due Date – Ticket 66958 (29/01/2025 13:57)



The screenshot shows the 'Progress System Options' window with the 'Stock' tab selected. The 'Stock Options' section is expanded, showing 'Allocations' and 'Issues' sub-sections. The 'Allocations' section has four checked options: 'Select Specific Batch for SO Allocations', 'Auto Allocate PO/WO Released Stock', 'Open SO Allocations if PO Receipt has additional balance', and 'Open SO Allocations if WO Receipt has additional balance'. The 'Issues' section has eight options, with the first five checked: 'Issue Goods to WO from PO Receipts', 'When Issuing to WO from PO Receipts, set Issue Date to Receipt Date', 'Issue Goods to WO from Adjustment/Free Issue Receipts', 'Issue Goods to Parent WO from WO Receipts', and 'Auto Issue Text/Subcon Released Stock'. The 'Future Stock for Structured BOM Tool Options' section has 'Display Future Shortages for' set to 6 Weeks and 'Display BOM Structures to' set to 10 Levels. The 'Calculations based on' section has 'Required Date' selected. The 'Stock Status' section has 'Show Batches in Stock Status' checked. The 'Receipts' section has 'Adjust Stock on to Original GRN for Customer Returns' and 'Warn if PO Received Early by' (set to 1) checked. A red box highlights the 'PO Receipts Due Date based on (instead of Required Date)' section, which has 'Latest Date' selected. Other options in the 'Receipts' section include 'Late PO Receipt Reason Required', 'PO Receipt Requires a Batch No', and 'Allow Completion of Work Orders when Total Qty Received'.

Inventory

Inventory - Allocations - Date filters now available when allocating GRNs to SO lines from a receipt

WO, PO Receipts :- SO Allocation screen - Sales Order and Date filters now enabled when the form is opened from a receipt. - Ticket 67336 (11/02/2025 10:08)

Inventory

Inventory – Part No - Related Items - WO planned Start and Finish dates added to part's Work Orders grid

Part Number - Related Items - WO. Show Start and Finish Dates - Ticket 67120 (03/02/2025 14:12)



The screenshot shows the 'Part No: (174415) ZNCF-80' window with the 'Related Items' tab selected. The 'Work Orders' section is expanded, showing a table of work orders. The table has columns: 'WO No', 'Status', 'Reference', 'Rev', 'Quantity', 'Quantity O/S', 'UOM', 'Start Date', and 'Finish Date'. A red box highlights the 'Start Date' and 'Finish Date' columns. The table contains one row: WO No 50327, Status Completed, Reference PO78832, Rev, Quantity 1.00, Quantity O/S 0.00, UOM Each, Start Date 27/09/2021, and Finish Date 27/09/2021. The 'Work Orders' button in the left sidebar is also highlighted with a red box.

Inventory

Inventory - Stock Transfers - Transferring stock to a location marked as Requires Release automatically marks the GRN as Requires Release

Transferring Stock to a Requires Release location now marks the GRN to Requires Release. Transferring from a RR location does not update the GRN RR - Ticket 67942 (27/03/2025 15:11)

Inventory Transfers

Grid Filters
Our P/N : 00-00173-108 GRN No : Clear Refresh

Results

GRN/Line	Part Number	Description	Batch No	Qty Held	Free Qty	Location	Transfer Qty	Transfer Location	Transfer Reason	New Default Location
9958/2	00-00173-108	Hoof Valve		9.00	9.00	STORES	2.00			
9958/3	00-00173-108	Hoof Valve		2.00	2.00	STORES	0.00			
9526/1	00-00173-108	Hoof Valve		3.00	3.00	STORES	0.00			
8843/1	00-00173-108	Hoof Valve	1234	2.00	2.00	STORES	0.00			

Location Quarantine RR

481A ☐ ☐ ☐

481B ☐ ☐ ☐

481C ☐ ☐ ☒

481D ☐ ☐ ☐

6668A ☐ ☒ ☐

8A1 ☐ ☐ ☐

8A2 ☐ ☐ ☐

8A3 ☐ ☐ ☐

Inventory Transfers

Grid Filters
Our P/N : 00-00173-108 GRN No : Clear Refresh

Results

GRN/Line	Part Number	Description	Batch No	Qty Held	Free Qty	Location	Transfer Qty	Transfer Location	Transfer Reason	New Default Location
9958/2	00-00173-108	Hoof Valve		7.00	7.00	STORES	0.00			
9958/3	00-00173-108	Hoof Valve		2.00	2.00	STORES	0.00			
9958/4	00-00173-108	Hoof Valve		2.00	2.00	481C	0.00			
9526/1	00-00173-108	Hoof Valve		3.00	3.00	STORES	0.00			
8843/1	00-00173-108	Hoof Valve								

GRN History Form - 9958/4

GRN Details
Part No 00-00173-108 Description Hoof Valve Conv Qty 1.00
Group Code PMC UOM Each UOP Each GRN Date Received 21/04/2025

History Documents Stock Receipt Edit Related Items Stock Movement

Location 481C Date Received 21/04/2025 Late Reason Requires Release ☒

Batch No 1.1235 Weight 1.1235 Customer Return Credit ☐

Unit Cost £8.00 Revision B Expiry Date 31/07/2026

Advice Note 123

Notes User Defined Fields

Inventory

Inventory - Sales Trend - New option added to allow user to see sales history/trends from inventory section

Inventory - Purchasing Trend - New option added to allow user to see purchase history/trends from inventory section

Sales Trend & Purchasing Trend added to Inventory Section - Ticket 67723 (14/03/2025 14:59)

Inventory

Part List Allocations Issues Receipts Transfers Expired Stock Stock Check Purchasing Trend Sales Trend

Purchasing Trend

Part No : Supplier RAA001 PO Date From 22/04/2024 To 21/04/2025 Refresh Clear

Results

PI No	Status	PI Date	Qty Matched	PO No	Minimum Cost	Maximum Cost	Average Cost	Purchasing Cost*	476/1	475/1	475/2	471/2	471/3
158	Entered	21/04/2025	25.00	1847/1	£20.00	£20.00	£20.00	£25.00	Entered	Entered	Entered	Entered	Entered
182	Entered	15/04/2025	7.50	1845/1	£15.00	£60.00	£37.50	£15.00	Entered	Entered	Entered	Entered	Entered
204	Entered	15/04/2025	100.00	1832/1	£100.00	£100.00	£100.00	£100.00	Entered	Entered	Entered	Entered	Entered

Sales Trend

Part No : Include last 10 Invoices Quick Date Range Last 24 Months

Customer ABB001 SO Date From 22/04/2023 To 21/04/2025 Refresh Clear

Results

Invoice No	Minimum Price	Maximum Price	Average Price	Selling Price*	1397/1	1366/1	1366/2	1249/1	1081/1	1075/1
Invoice Date					13/03/2025	29/01/2025	29/01/2025	07/08/2024	21/02/2024	14/02/2024
Invoice Qty					10.00	10.00	10.00	10.00	1.00	1.00
SO No					1410/1	1189/1	1231/1	1231/1	1105/1	1003/1
(32961) LN2G-63_80	£10.00	£10.00	£10.00	£49.62	-	£10.00	-	-	£0.00	-
REPAIR	£250.00	£250.00	£250.00	£0.00	-	-	-	-	-	£250.00
SGS1046	£55.00	£60.00	£56.67	£55.00	£60.00	-	£55.00	£55.00	-	-

Inventory

Inventory - Parts List - Enquiry quantity lead time added to the Enquiries grid in part's Related Items

Part Related Items: - Enquiries: - Added enquiry qty lead time to grid - Ticket 67786 (03/03/2025 10:09)

Part No: 0.332.209.150

Part Details More Details BOM Routing Costing Price Matrix Stock Status **Related Items** Notes Documents Certificates Messages Transactions Stock Movement

Click to view details

Enquiries

Enq/Line	Status	Enquiry Date	Customer	Estimator	Rev	Quantity	UOM	Unit Price	Discount %	Net Unit Price	Gross Total	Net Total	Lead Time	Currency
637/1	Converted	17/04/2025	maria: Maria Engineering 2	Maria Pearson		1.00	Each	10.00	0.00	10.00	10.00	10.00	14	
637/1	Converted	17/04/2025	maria: Maria Engineering 2	Maria Pearson		3.00	Each	10.00	0.00	10.00	30.00	30.00	14	
475/1	Converted	05/10/2023	DCL: Dynamic Ceramic			1.00	Each	5.42	0.00	5.42	5.42	5.42	0	
414/1	Lost	20/01/2023	AB1994: AB	John Smith		1.00	Each	8.89	0.00	8.89	8.89	8.89	0	
278/1	Quoted	04/02/2021	ABE001: Abercom Systems Ltd			10.00	Each	5.50	20.00	4.40	55.00	44.00	0	

Inventory

Inventory - Parts List - Ability to set default certification for purchased parts (for Enhanced PO Certification functionality only)

Inventory: - Default Certificates: - If Enhanced PO Certificates is switched on Certificates can be added to Part No's (new certificates tab) and these are pulled through when a PO is raised for the Part - Ticket 67714 (26/03/2025 9:05)

Part No: 0.332.209.150

Part Details More Details BOM Routing Costing Price Matrix Stock Status Related Items Notes Documents

Certificates Messages Transactions Stock Movement

Certificates

Material Specification Add Certificate

Part Certificate	Date Added
Certificate of Conformity	21/04/2025
Material Specification	21/04/2025

Purchase Order: 1854

Header Contact Details Related Items Notes Documents Messages **Certificates** Transactions

Certificates

Add Certificate Remove Certificate

Line No	Part No	Description	Select
1	0.332.209.150	Bosch 12v 30amp Relay xfgbhxgh	

Certificate	Received
Certificate of Conformity	<input type="checkbox"/>
Material Specification	<input type="checkbox"/>

Inventory

Inventory - Stock Movement - Additional date filter added for specific date

Inventory Detail: - Stock Movement tab: - Specific Date option added to the fixed date options - Ticket 68682 (03/04/2025 15:37)

Part No: EC120

Part Details | More Details | BOM | Routing | Costing | Price Matrix | Stock Status | Related Items | Notes | Documents | Certificates

Messages | Transactions | **Stock Movement**

Stock Movement

Display: **Specific Date** From: 05/05/2025 Refresh * Quarantine Issues and Receipts do not affect the Balance.

Date	GRN/Line	Batch No	Type	Description	Quarantine	Issues	Receipts	Balance
14/05/2025	3584/1		WRITE_OFF	Write Off		2.00		250.00
14/05/2025	3580/1		WRITE_OFF	Write Off		1.00		249.00
14/05/2025	3587/1		B_ADJ	Batch Adjustment			1.00	250.00
Σ			TOTALS			3.00	1.00	

Inventory

Inventory - Receipts - Customer Returns grid now includes GRN No details

Customer Return form: - Added GRN No to the grid - Ticket 69871 (13/05/2025 8:50)

Customer Returns

Grid Filters

Customer ID: [] Our P/N: [] Clear Refresh

Delivery No / Line	Customer	Name	Sales Order No / Line	Cust Order No	Part No	Description	GRN No
1441/2	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10097/1
1441/3	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10098/1
1441/4	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10099/1
1441/5	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10100/1
1441/6	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10101/1
1441/7	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10102/1
1441/8	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10103/1
1441/9	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10104/1
1441/10	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10105/1
1441/11	ENG010	Blacks Engineering	1468/1	BEL290525	Engine Baffle ...	Engine Capacity Limit...	10174/1
1440/1	BEP001	Building Engineering Li...	1487/2	BEL260625	192	Machined Plate	10177/1
1440/2	BEP001	Building Engineering Li...	1487/4	BEL260625	177	Full Time Assembly	10193/1
1439/1	ENG002	Engineering Scotland L...	1486/4	ESP24-06-25	177	Full Time Assembly	10180/1

Inventory

Inventory - Price Matrices - Ability to delete existing price matrix entries now added

Inventory Price Matrix: - added ability to Delete selected price matrix records en masse. Done from the Inventory Price Matrix Export screen, the initial request was to add a Delete column to the Import spreadsheet, but this makes more sense, because it can be done on the screen without having to Export, update the spreadsheet and then re-import. - Ticket 67715 (29/05/2025 10:12)

The screenshot shows the ProgressPlus.NET software interface. The 'Tools' menu is open, and 'Inventory Price Matrix' is selected. The 'Export' tab is active in the 'Import / Export' window. The 'Grid Filters' section shows 'Our P/N' set to 132. The 'Results' table lists 10 price matrix records for Part No 132, all of which are selected with checkboxes. A confirmation dialog box titled 'ProgressPlus.NET' is displayed, asking 'You are about to delete 10 price matrix records. This cannot be undone. Are you sure you want to continue?' with 'Yes' and 'No' buttons. The 'Delete' button is highlighted in the bottom left corner of the main window.

...	ID	Name	Part No	Part Description	Ra...	Qty	Price	Di...	Disc/Sur...	Notes
<input checked="" type="checkbox"/>	C	< STANDA...	132	Curved Tiles	Up...	20.00	45.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	< STANDA...	132	Curved Tiles	Over	20.00	35.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	COORSTE...	CoorsTek Scotland	Curved Tiles	Up...	10.00	35.00	10...	Surcharge	
<input checked="" type="checkbox"/>	C	COORSTE...	CoorsTek Scotland	Curved Tiles	Up...	100.00	25.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	COORSTE...	CoorsTek Scotland	Curved Tiles	Over	0.00	40.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	DCL	Dynamic Ceramic	Curved Tiles	Up...	12.00	25.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	DCL	Dynamic Ceramic	Curved Tiles	Up...	24.00	20.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	DCL	Dynamic Ceramic	Curved Tiles	Over	0.00	25.00	0.00	Discount	
<input checked="" type="checkbox"/>	C	DCL	Dynamic Ceramic	Curved Tiles	Over	20.00	20.00	0.00	Discount	
<input checked="" type="checkbox"/>	S	ENC001	Enco S.A.	Curved Tiles	Over	0.00	100.00	5.00	Surcharge	

Inventory

Inventory - Related Items - Added VALUE column to Receipts grids

Inventory - Related Items: - Receipts: - Added Value column to the grids - Ticket 71199 (03/07/2025 8:52)

Part No: EC120

Part Details | More Details | BOM | Routing | Costing | Price Matrix | Stock Status | **Related Items** | Notes | Documents | Certificates | Messages | Transactions | Stock Movement

Click to view details

Enquiries

Sales Orders

Work Orders

Purchase Orders

Subcon Purchase Orders

Purchase Enquiries

Purchase Requisitions

Purchase Invoices/Credits

Subcon Invoices/Credits

Receipts

Issues

Deliveries

Sales Invoices/Credits

NCR

TQ

Associated Tools

Price History

Manual

Limit Records

Grid Options

GRN/Line	Receipt Type	Receipt Date	Batch No	Location	Rev	Advice Note	Quantity Received	Quantity Left	Quantity Free	Unit Cost	Value
3606/1	WO_REC	27/08/2025	2871/1	Stores	D		1.00	1.00	1.00	11.86666	11.87
3604/1	PO_REC	25/08/2025		Stores	D	123	30.00	25.00	25.00	20.00	600.00
3604/2	TRANSFER	25/08/2025		Reject Area	D	123	5.00	5.00	5.00	20.00	100.00
3601/1	PO_REC	11/08/2025		Reject Area	D	123	10.00	10.00	10.00	45.50	455.00
3600/1	PO_REC	11/08/2025		Stores	D	123	20.00	20.00	20.00	41.80	836.00
3599/1	PO_REC	11/08/2025		Stores	D	123	10.00	10.00	10.00	54.00	540.00
3598/1	PO_REC	11/08/2025		Stores	D	123	10.00	10.00	10.00	41.325	413.25
3597/1	PO_REC	11/08/2025		Stores	D	123	10.00	10.00	10.00	41.325	413.25
3596/1	PO_REC	11/08/2025		Stores	D	123	10.00	10.00	10.00	62.00	620.00
3594/1	PO_REC	11/08/2025		Stores		123	5.00	5.00	5.00	75.00	375.00
3594/2	PO_REC	11/08/2025		Stores		123	1.00	1.00	1.00	0.00	0.00
3590/1	WO_REC	07/07/2025	2852/1	Stores			12.00	12.00	12.00	0.00	0.00
3589/1	WO_REC	19/03/2025	2859/1	Electronic Shelf			11.00	11.00	11.00	0.00	0.00
3587/1	PO_REC	03/02/2025		Stores	D	123	11.00	5.00	5.00	54.75	602.25
3587/2	TRANSFER	03/02/2025		Rack 3	D	123	5.00	3.00	3.00	54.75	273.75
3587/3	TRANSFER	03/02/2025		Modula	D	123	2.00	2.00	2.00	54.75	109.50
3586/1	PO_REC	03/02/2025		Stores	D	123	10.00	9.00	9.00	65.70	657.00
3585/1	PO_REC	03/02/2025		Stores		123	5.00	0.00	0.00	75.00	375.00
3585/2	PO_REC	03/02/2025		Stores		123	1.00	0.00	0.00	0.00	0.00
3584/1	PO_REC	03/02/2025		Stores	D	123	10.00	8.00	8.00	42.275	422.75
3583/1	PO_REC	03/02/2025		Stores	D	123	10.00	10.00	10.00	55.25	552.50
3582/1	PO_REC	03/02/2025		Stores	D	123	10.00	10.00	10.00	55.25	552.50
3581/1	PO_REC	03/02/2025		Stores	D	123	148.00	0.00	0.00	13.125	1942.50
3580/1	PO_REC	03/02/2025		Stores	D	123	15.00	12.00	12.00	10.00	150.00
3579/1	PO_REC	22/01/2025		Stores	D	123	10.00	0.00	0.00	65.70	657.00
3573/1	PO_REC	08/01/2025		Stores	D	123	10.00	0.00	0.00	65.70	657.00

Print | Accept | Close

Inventory

Expiry Dates and Outlife. Version Specific Option :- Temperature Controlled Stock. Stock Location has a checkbox for Temperature Controlled Location. Parts can be set as Temp Controlled and have an Ambient Life in Hours. When receipting a Part into Stock check it is going to a Temp Controlled Location. Record when a part is transferred in and out of a Temp Controlled location and reduce the Ambient Life left. Temperature Controlled Stock Report shows ambient life remaining on Parts with a GRN Qty greater than Zero - Ticket 71875 (26/08/2025 9:24)

Part No: CODEM0909

Part Details | More Details | BOM | Routing | Costing | Price Matrix | Stock Status | Related Items | Notes | Documents | Certificates | Messages

Transactions

Stock Movement

Stock Levels (UoM)

Min Stock Level 0.00

Max Stock Level 0.00

Safety Stock 0.00

Minimum Order Quantities

MOQ WO 0.00 Each

MOQ SO 0.00 Each

MOQ PO 0.00 Each

Lead Times (Days)

Sales 0

Manufacturing 0

Purchasing 0

Nominals

Sales (Default)

Purchase (Default)

Commodity Code

Re-Order Levels (UoM)

Re-Order Level 0.00

Re-Order Qty 0.00

Batch Quantities

WO 0.00 Each

PO 0.00 Each

VAT Rates

Overwrite Sales Default VAT Rate %

Overwrite Purchase Default VAT Rate %

Stock Category & Ambient Life

Category Annually

Temperature Controlled ☒ Ambient Life (Hours) 24

Temperature Controlled Stock

GRN No	Part No	Description	Qty Left	Batch No	Date Received	Ambient Life (Hrs)
10521/1	CODEM0909	Composite kept in freezer at -10 degrees	1.00	AB0909	09/09/25	24
Left Temp Contolled			Re-entered Temp Controlled		Ambient Time (hhmm)	
09-09-2025 15:45			09-09-2025 15:50		00:05	
			Total Ambient Time (hhmm)		00:05	
			Remaining Ambient Time (hhmm)		23:55	

---- End Of Report ----

Section – Work Orders

Work Orders

Work Orders - Work Orders - Quantity, No of Scrap Entries and Scrap Quantity columns added to Operation Summary and Work Centre Summary grids in Booking tab

WO Detail - Booking Tab: - Added Quantity, No of Scrap Entries, and Scrap Quantity columns to the Operation and Work Centre Summary grids - Ticket 58910 (07/08/2024 16:39)

Work Order: 2860

Details

BOM

Routing

Issues

Bookings

Cost Summary

Related Items

Notes

Documents

Messages

Transactions

Op No	Op Description	No of Entries	Set Up Time	Run Time	Total Time	First Date	Last Date	Quantity	No of Scrap Entries	Scrap Quantity	Total Cost
10	Punch Holes To Drawing	1	0:00	0:00	0:00	13/11/2024	13/11/2024	2.00	0	0.00	0.000

Show for

WO 2860 (this WO) Only

All WO with Master WO 2859

Show

Labour Booking Details

Employee Summary

Operation Summary

Total Setup (hh:mm)

00:00

£0.0000

Total Run (hh:mm)

00:00

£0.0000

Total Rework (hh:mm)

00:00

£0.0000

Total Booked (hh:mm)

00:00

£0.0000

IM

Menu

Print

Accept

Close

Work Orders

Work Orders - Work Orders - Option to show WO warning note when accessing existing WOs

Warning Notes: - Option to show WO Warning Notes when opening an existing WO. - Ticket 57517 - 03/10/2024 14:14

Progress System Options

SFDC | T & A | Quality | System Numbers | Accounts Link | Email Settings | Printing | Forecasting | Outlook Add-In | Document Import
 Company Details | Costing | Miscellaneous | Inventory | Stock | Enquiry & SO | Work Orders | Delivery & Invoicing | Purchasing | **Notes** | Labour

Notes

Customer Warning Notes - Show Warning for...

<input checked="" type="checkbox"/> New Enquiry	<input type="checkbox"/> Existing Enquiry
<input checked="" type="checkbox"/> New Sales Order	<input type="checkbox"/> Existing Sales Order
<input checked="" type="checkbox"/> New Delivery	<input type="checkbox"/> Existing Delivery
<input checked="" type="checkbox"/> New Invoice/Credit	<input type="checkbox"/> Existing Invoice/Credit

Enquiry Warning Notes - Show Warning for...

<input type="checkbox"/> New Sales Order	<input type="checkbox"/> Existing Enquiry
<input type="checkbox"/> New Delivery	<input type="checkbox"/> Existing Sales Order
<input type="checkbox"/> New Invoice/Credit	<input type="checkbox"/> Existing Delivery
	<input type="checkbox"/> Existing Invoice/Credit

Part Number Warning Notes - Show Warning for...

<input checked="" type="checkbox"/> New Enquiry	<input type="checkbox"/> Existing Enquiry
<input checked="" type="checkbox"/> New Sales Order	<input type="checkbox"/> Existing Sales Order
<input checked="" type="checkbox"/> New Delivery	<input type="checkbox"/> Existing Delivery
<input checked="" type="checkbox"/> New Invoice/Credit	<input type="checkbox"/> Existing Invoice/Credit
<input checked="" type="checkbox"/> New Work Order	<input checked="" type="checkbox"/> Existing Work Order
<input checked="" type="checkbox"/> New Purchase Order	<input type="checkbox"/> Existing Purchase Order
<input checked="" type="checkbox"/> New PI Match	<input type="checkbox"/> Existing PI Match
<input checked="" type="checkbox"/> New Supplier Enquiry	<input type="checkbox"/> Existing Supplier Enquiry
<input checked="" type="checkbox"/> New Supplier Requisition	<input type="checkbox"/> Existing Supplier Requisition
<input checked="" type="checkbox"/> PO Receipt	<input checked="" type="checkbox"/> WO Receipt
<input checked="" type="checkbox"/> FI Receipt	<input checked="" type="checkbox"/> Issue to Production

Supplier Warning Notes - Show Warning for...

<input checked="" type="checkbox"/> New Purchase Order	<input checked="" type="checkbox"/> Existing Purchase Order
<input checked="" type="checkbox"/> New PI Match	<input type="checkbox"/> Existing PI Match
<input checked="" type="checkbox"/> New Supplier Enquiry	<input checked="" type="checkbox"/> Existing Supplier Enquiry
<input type="checkbox"/> New Supplier Requisition	<input type="checkbox"/> Existing Supplier Requisition

Purchase Order Warning Notes - Show Warning for...

<input checked="" type="checkbox"/> New PI Match	<input checked="" type="checkbox"/> Existing Purchase Order
<input checked="" type="checkbox"/> PO Receipt	<input type="checkbox"/> Existing PI Match

Sales Order Warning Notes - Show Warning for...

<input checked="" type="checkbox"/> New Delivery	<input type="checkbox"/> Existing Sales Order
<input checked="" type="checkbox"/> New Invoice/Credit	<input type="checkbox"/> Existing Delivery
	<input type="checkbox"/> Existing Invoice/Credit

Works Order Warning Notes - Show Warning for...

<input checked="" type="checkbox"/> WO Receipt	<input checked="" type="checkbox"/> Existing Work Order
--	---

Miscellaneous Notes Options

<input type="checkbox"/> Enquiry General notes to SO General when converting (New SO Only)
<input checked="" type="checkbox"/> Enquiry line notes to SO line notes when converting
<input checked="" type="checkbox"/> SO line notes to WO notes
<input checked="" type="checkbox"/> SO line notes to Delivery line notes
<input checked="" type="checkbox"/> Delivery line notes to Invoice line notes
<input checked="" type="checkbox"/> Do NOT fetch Part PE/PO Notes when converting from a PR/PE

All items marked with a * are Company Specific

Accept Close

Part No: EC120

Messages | Transactions | Stock Movement
 Part Details | More Details | BOM | Routing | Costing | Price Matrix | Stock Status | Related Items | **Notes** | Documents

Notes

General
 Internal Notes
 Delivery
 C of C
 Invoice
 Purchase
 Purchase Enquiry
 Purchase Requisition
 Sales
 Sales Enquiry
 Work Order
 Inspection Notes
 Warning: Delivery
 Warning: Enquiry
 Warning: Invoice/Cr...
 Warning: Issue to Pr...
 Warning: PE
 Warning: PI
 Warning: PO
 Warning: PO Receipt
 Warning: FI Receipt
 Warning: PR
 Warning: SO

Sub Assembly WO Qty 1

Warning: WO Sub Assembly WO Qty 1

Stamp
 Library

IM Menu Print Accept Close

Work Order: 2859

Details BOM Routing Issues Bookings Cost Summary Related Items **Notes** Documents Messages Transactions

Notes

General WO 2859 Warning Note

Reprint

C of C

Internal

Warning WO 2859 Warning Note

Stamp

ProgressPlus.NET - WO Warning Notes

WO No 2859: WO 2859 Warning Note

OK

ProgressPlus.NET - Part Warning Notes

Part No EC120: Sub Assembly WO Qty 1

OK

Work Orders

Work Orders - Work Orders - Option added to reset all grids on WO Overview screen

Added reset All grids to standard on WO Overview -Ticket 65736 (28/11/2024 16:37)

Work Order Overview

Grid Filters

Status <=: 50 Our P/N: WO No: Created Date >= 02/04/2024 and 02/04/2025 Refresh Clear

Work Order Details

Notes	WO No	Status	Part No	WO Rev	Description	WO Qty	WO OS
...	2838	Created	ACT40V		This equipment is designed ...	10.00	10.00
...	2845	Created	T-398483		Sub Assy 1	1.00	1.00
...	2846	Created	T-398483		Sub Assy 1	1.00	1.00
...	2847	Created	T-398483		Sub Assy 1	1.00	1.00
...	2848	Created	T-398483		Sub Assy 1	1.00	1.00
...	2850	Created	T-398483		Sub Assy 1	1.00	1.00

BOM Routing Purchase Orders Issues Bookings Non Conformances

Notes	WO No	Part No	Description	BOM Qty	Total Qty	Issued Qty	Active	On Order W
...	2847	3636634GHC	Compressor Delivery Casing...	1.00	1.00	0.00	0.00	0.00
...	2847	BAT010	Cell Button Battery (Non Re...	1.00	1.00	0.00	0.00	0.00
...	2847	PAOP-12-0003	Perspex Acrylic Opal Plastic...	1.00	1.00	0.00	0.00	0.00

Grid Options Menu

Reset to Standard (All Grids)

Close

Work Orders

Work Orders - Below MSL - New option added for excluding on hold SO requirements

On Order (SO) figure and the Remove SO Line Requirement for On Hold SO and Unpaid Proforma System Options:

1. If either/both of these options are switched on, then the Inventory On Order (SO) figure should not include SO Lines that match the option. This means all existing shortage calculations will still work, but it will also resolve reported problems of these SO Lines generating a shortage on the Below MSL and PO Shortages screens.

Progress System Options

SFDC | T & A | Quality | System Numbers | Accounts Link | Email Settings | Printing | Forecasting | Outlook Add-In
Company Details | Costing | Miscellaneous | Inventory | Stock | Enquiry & SO | Work Orders | Delivery & Invoicing | Purchasing | Notes | Labour

Enquiry Defaults | Contract Review

Respond By: 5 day(s) after Quote Entered
Decision By: 10 day(s) after Quote Entered

☒ Auto Update Enquiry Header Status
Submitted: Submitted
Decided: Decided Won test
Entered: Received

☐ Automatically Populate Enquiry Reference field
☐ Converting to SO use Promised Date for SO Req/Prom Dates
☒ Converting to SO Set SO Line Item No to SO Line No

☐ Default Follow Up By to Customer Sales Rep
☒ Print only when Enquiry Contract Review is Complete

ProgressPlus.NET

NOTE: Data Fix needs ran to recalculate the SO Line Requirement of any Sales Orders marked as Proforma Invoice!

OK Cancel

Sales Order Defaults | SO Line Requirements

☒ Show Profit Function on SO (Useful for Distributors)
☒ Warn if Customer Order No Empty
☒ Flag Duplicate Customer Order No's at SO Stage
☒ Flag Duplicate Customer Contract No's at SO Stage
☒ Auto Apply Suggested Price when creating SO Lines
☐ Use Group Code Families In Price Matrix Calculations
☐ Group Code can be Member of Multiple Families
☒ Use Complete Delivery Option
☒ Use Estimated Price
☐ Mark Estimated Price as Default

☒ Show Scheduled Invoices
☒ Warn if SO Line Rev Differs from WO Rev (When saving an SO)
☒ Warn if PO or WO Rev Differs from SO Rev (When Receipting and Allocating)
☒ Warn if Order No amended to update related Work Order Reference
☒ Unpaid Proforma Sales Orders do not generate Requirement
☐ On Hold SO Lines do not generate Requirement
☒ Automatically Update Submitted Status (Print)
☒ Warn if Unconverted Enquiry Line exists for Customer/Part No at SO Entry
☐ Check Accounts Link is Valid before creating SO
Print only when Contract Review is Complete ☒ SOA ☐ Production Order

All items marked with a * are Company Specific

Accept Close

Progress System Options

SFDC | T & A | Quality | System Numbers | Accounts Link | Email Settings | Printing | Forecasting | Outlook Add-In
Company Details | Costing | Miscellaneous | Inventory | Stock | Enquiry & SO | Work Orders | Delivery & Invoicing | Purchasing | Notes | Labour

Enquiry Defaults | Contract Review


Respond By: 5 day(s) after Quote Entered
Decision By: 10 day(s) after Quote Entered

☒ Auto Update Enquiry Header Status
Submitted: Submitted
Decided: Decided Won test
Entered: Received

☐ Automatically Populate Enquiry Reference field
☐ Converting to SO use Promised Date for SO Req/Prom Dates
☒ Converting to SO Set SO Line Item No to SO Line No

☐ Default Follow Up By to Customer Sales Rep
☒ Print only when Enquiry Contract Review is Complete

ProgressPlus.NET

 If you have existing On Hold SO Lines, you should run the Data Fix after changing this option. This will recalculate line requirements based on the new setting.
Note: Any users currently logged on will continue to use the existing setting until they log off.

OK

Sales Order Defaults | SO Line Requirements

☒ Show Profit Function on SO (Useful for Distributors)
☒ Warn if Customer Order No Empty
☒ Flag Duplicate Customer Order No's at SO Stage
☒ Flag Duplicate Customer Contract No's at SO Stage
☒ Auto Apply Suggested Price when creating SO Lines
☐ Use Group Code Families In Price Matrix Calculations
☐ Group Code can be Member of Multiple Families
☒ Use Complete Delivery Option
☒ Use Estimated Price
☐ Mark Estimated Price as Default

☒ Show Scheduled Invoices
☒ Warn if SO Line Rev Differs from WO Rev (When saving an SO)
☒ Warn if PO or WO Rev Differs from SO Rev (When Receipting and Allocating)
☒ Warn if Order No amended to update related Work Order Reference
☒ Unpaid Proforma Sales Orders do not generate Requirement
☒ On Hold SO Lines do not generate Requirement
☒ Automatically Update Submitted Status (Print)
☒ Warn if Unconverted Enquiry Line exists for Customer/Part No at SO Entry
☐ Check Accounts Link is Valid before creating SO
Print only when Contract Review is Complete ☒ SOA ☐ Production Order

All items marked with a * are Company Specific

Accept Close

2. If either/both of these options are switched on, then the Stock Status will show an additional figure in brackets to represent the combined figure relating to these SO Lines (similar to Active (Requires Release) figures).

Part No: 183

Certificates | Messages | Transactions | Stock Movement

Part Details | More Details | BOM | Routing | Costing | Price Matrix | **Stock Status** | Related Items | Notes | Documents

Supply:

Active	95.00
On Order (PO)	0.00
On Order (WO)	85.00
Forecast (WO)	0.00

Demand: Min Stock Level 0.00

On Order (SO)	60.00 (25.00)
Required for WO	0.00
Reqd Forecast WO	0.00

Include Forecast WO ☐

Surplus 120.00

On Order (SO)

SO	Status	Customer	Order No	Order
On Order (SO)				
1425/1	WIP	Engineering Scotland Limited	test quote BOM costs	10/04/2
On Order (SO) - On Hold/Unpaid Proforma				
1424/1	On Hold	Argo Engineering	AE100425	10/04/2

3. On the Below MSL screen, a new checkbox to exclude On Hold SO Lines should be added, to match the existing Exclude Unpaid Proforma SO one. These are necessary for users who don't have the above system options switched on, but if either system option is switched on, then the related checkbox on the below MSL screen should be disabled, as these SO lines will already be excluded here as a result of point number 1. -Tickets 66232/67541 – (24/02/2025 16:05)

Manufactured Items With Stock Shortage

Filters (Top Level Parts ONLY)

Part No

Group Code

Refresh Grid

21/04/2025

AND

21/04/2025

Clear Filters

Options

Display 5 Levels

☒ Allow WO Start Dates to be in the Past
 ☐ Include Obsolete Parts

☐ Calculate Date Stock Falls Below MSL
 ☐ Hide Purchased Items

☐ Do NOT Recalculate Dates when Edited Manually
 ☐ Hide FI Items

Shortage Based on Supply and...

☐ MSL Only
 ☒ Overall Demand

☐ Overall Demand Excluding MSL
 ☐ Exclude Active Stock

☒ Exclude On Hold SO Lines
 ☒ Exclude Unpaid Proforma SO
 ☐ Include FI Rec/Req
 ☐ Include Forecast WO/Req

Results

Level	Part No	Part Description	Status	Purchased	FI	Active Stock	On Order (WO)
1	(5014094) 418-24...	Socket Contact (SC:6090:A01)	Live	<input type="checkbox"/>	<input type="checkbox"/>	10.00	0.0
2	0.332.209.150	Bosch 12v 30amp Relay xfgbhxgh	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	38.00	42.0
2	00-00569-200	White VPLC Temperature	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	911.00	0.0
2	00-00802-600	PMC 600 Module, 24v	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0.0
2	00-00727-240	24v PSV Battery Guard ECU	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0.0
2	00-00853-000	Switch Adapter	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0.0
2	00-00660-121UNP	Unpotted BG2000 ECU 12v , No Auto...	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0.0
1	00-00098-000	TOUCHLITE CONTROL	Live	<input type="checkbox"/>	<input type="checkbox"/>	33.147	632.2
2	00-00333-000	Smart Blok Jr	Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	53.00	560.0
2	00-00507-524	24v 200a Relay	Live	<input type="checkbox"/>	<input type="checkbox"/>	6.00	349.2
-2	00-00055-006	Relay Assy-Bat Grd 24V	Obsolete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	718.00	0.0
2	material part		Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0.0
1	00-00145-000	7a Latching Controller	Live	<input type="checkbox"/>	<input type="checkbox"/>	2.00	37.0
2	Al FB 6063-000M	Aluminium Flat Bar 6063 3/8" x 1/8"	Live	<input type="checkbox"/>	<input type="checkbox"/>	13.600.00	2.021.0

Line Details

Fill 'Raise WO Qty' with Suggested Qty

Legend

Top Level

Part In Dev/To Be Reviewed

Obsolete

Grid Options

Print

Accept

Close

Section – Labour

Labour

Section – T & A

T&A

Section – Quality

The features in the section are only available to customers who have the Quality Module

Quality

Reports - Supplier Quality Summary report - Supplier standard added

Supplier Quality Summary Report - Added Supplier Standard – Ticket 61306 (13/08/2024 11:09)

Reports

Quick Search

Labour

Mac

PI Matching

Projects

Purchasing

Quality

Calibration Detail

Calibration Due

Non Conformance Action

Non Conformance By Fault Category

Non Conformance By Fault Category Det

Non Conformance By Source Detail

Non Conformance By Work Centre

Non Conformance By Work Centre Detail

Non Conformance Detail

Non Conformance Detail By Month

Non Conformance Grouped By

Non Conformance Summary

Non Conformance Trend Analysis

Non Conformance Type Grouped By

Scrap Analysis

Scrap Analysis Graph

Scrap Booked vs Booked Qty

Scrap Summary

Supplier Quality Summary

Technical Quality Detail

Toolbox (Expenditure Issue)

Reports

Print

100 %

1/2

Save Email Excel

Report Options

Options

Required Data

CaptionOperator TypeValue

Show Group Code ReportTrue

Show Certification ReportTrue

Show Capability ReportTrue

Filter Data

CaptionOperator TypeValue

Sort Data

CaptionDescending

Supplier Quality Summary

Show Group Code Report = True AND Show Certification Report = True AND Show Capability Report = True

Supplier Account

Details

Supplier StandardISO Approval Gained

Group CodePriceLeadQualityRating

Alu454425

Electronic354375

Fasteners333300

CertificationISO 9001:2008Expiry Date29/09/23

CapabilityAluminiumResourceAluminium Plate Alloy 2014 T651 9.53mm

ABB001: Abbey Engineering Supplies Ltd

Supplier StandardISO Approval Gained

CertificationISO 9001:2008Expiry Date19/01/24

CapabilityAluminiumResource

ABB002: Abbott Metal Supplies Ltd

Supplier StandardISO Approval Pending

Quality

Reports - Calibration Detail report - Added filter for default source

Reports - Calibration Due report - Added filter for default source

Added Default Source as filter on the Calibration Detail and Calibration Due report - Ticket 62090 (10/09/2024 13:54)

Reports

Quick Search

Mac
PI Matching
Projects
Purchasing
Quality

Report Options

Options Saved Options

Required Data

Caption	Operator Type	Value
Status	=	

Filter Data

Field	Operator Type	Value
Default Source	=	External

Calibration Due

Default Source = External

Tool No	Serial No	Company Serial No	Description	Last Calibrated By	Employee Responsible	Location	Last Calibrated	Calibration Due
28	KAW01	00035	150mm (5 inch) Digital Caliper	Kennedy Metrology	Paul McKenzie	Quality Department	13/03/23	13/09/23
4	005356	00004	Setting Ring Gauge No Go 1/2-14 14 Thread 1.814mm Ptdh	Hexagon Metrology	Paul McKenzie	Supervisor's Office	29/03/23	29/09/23
10	564763	00023	88 Piece Metric Grade Block Set	Cita Calibrates	Paul McKenzie	Supervisor's Office	13/04/23	13/10/23
31	19840	17523	Pressure Gauge 700 PSI	Kennedy Metrology			22/06/23	22/10/23
6	435433	00028	Bore Micrometer 8-10mm	Kennedy Metrology	Paul McKenzie	Tool Store	01/12/22	01/12/23
32	1.01123.56	56	Gauge Block Set Metric Steel 47 blocks			Quality Department	24/10/23	24/02/24
16	244/0710	00008	M22 x 1.56g Set Plug Thread Gage Go / NoGo	Cita Calibrates	Paul McKenzie	Machine Shop	02/04/24	02/04/25
36	OPUS1224	DCL1224	Slip Gauge Set	Hexagon Metrology	Ash Koss	Quality Department	17/07/24	17/07/25

---- End Of Report ----

Quality

Quality - Tooling & Equipment - Total Usage column added to main T&E Browse grid

Added Total Usage since last calibration to the Tooling/Equipment browse - Ticket 61849 (10/09/2024 18:25)

Tool/Equipment Record: 36

Record Details Calibration Related Items Notes Documents Messages Transactions

Tool Details

Tool Number: 36 Requires Calibration ☒

Status: Open

Description: Slip Gauge Set

Serial Number: OPUS1224

Company Serial No: DCL1224

Manufacturer: Opus

Group Name: Micrometers

Location: Quality Department

Purchase Date: 17/07/2024

Responsible: Ash Koss

Asset Value: £1,500.00

Asset Number: COORS1223

Part Number:

Tool Type: Factory Equipment

Tool Usage UOM: Features

Total Usage: 12 Total since calibration: 12

Total Issues: 1 Total since calibration: 1

User Defined Fields

Additional Test Certs

Annual Safety Check

Critical Part

Equip Due Back: 12/12/2024

MOT Due

IM Menu Print Accept Close

Quality

Tooling & Equipment

New View Refresh Group Categories Export Grid Options

Grid Filters

Tool Record: Serial No: Clear Save

Location: 18/11/2023 AND 18/11/2024

Drag a column header here to group by that column.

Tool Record	Status	Description	Group Names	Total Issued	Total Usage	Usage Since Valid	Usage UOM
16	Open	M22 x 1.5 6g Set Plug Thread Gage ...		6	260	220	
15	Open	Wrist-Mountable Multiple Echo Ultraso...		2	20	20	Features
36	Open	Slip Gauge Set	Micrometers	1	12	12	Features
5	Open	Bore Micrometer 12-16mm	Micrometers	1	12	12	
25	Open	Angle Gauge 3 & 4 Den	Angle Gauge	1	1	1	

Quality

Admin - System Options - Option added for displaying related NCR count on new deliveries

Added system option flag for new deliveries where the Open NCR count would prompt when saving a new delivery (new column on the grid to show open NCRs for any WO material for the line, ability to browse those NCR records - Ticket 58919 (24/10/2024 14:18))

(New Delivery)

Header Information

Delivery Number: Next Available
Delivery Date: 09/12/2024
Customer Account: AB1994
Reference:
Delivery By: Harry Hodgson
Delivered: ☐ Ready for Collection: ☐ Postcode:
POE Required: ☐

Department:
Shipping Method:
Delivery Address: AB Broomloan Road

Line Details

Order	C of C Required	Batch No	Available Qty	Qty To Deliver	Open NCRs	Required Date
	<input type="checkbox"/>	52024/1	1.00	1.00	1	16/10/2024

Customer Credit Limit

Status: Open Available Credit: 0.00 Invoices Waiting to be Transferred: 12,697.26
Delivered Not Invoiced (inc. current): 9,332.69 Credit Available: -22,029.95

ProgressPlus.NET

Open NCR(s): 130

OK

Quality

Quality - Tooling & Equipment – Usage Since Valid and Issued Since Valid columns added to T&E Browse grid

Amended Tooling Browse grid by adding column tool tips for Usage Since Valid (Calibration) and Issued Since Valid (Calibration) -Ticket 66748 (24/01/2025 13:19)

Tooling & Equipment

New View Refresh Group Categories Export Grid Options

Grid Filters

Tool Record:
Responsible: 36
Serial No:
14/04/2024 AND 14/04/2025

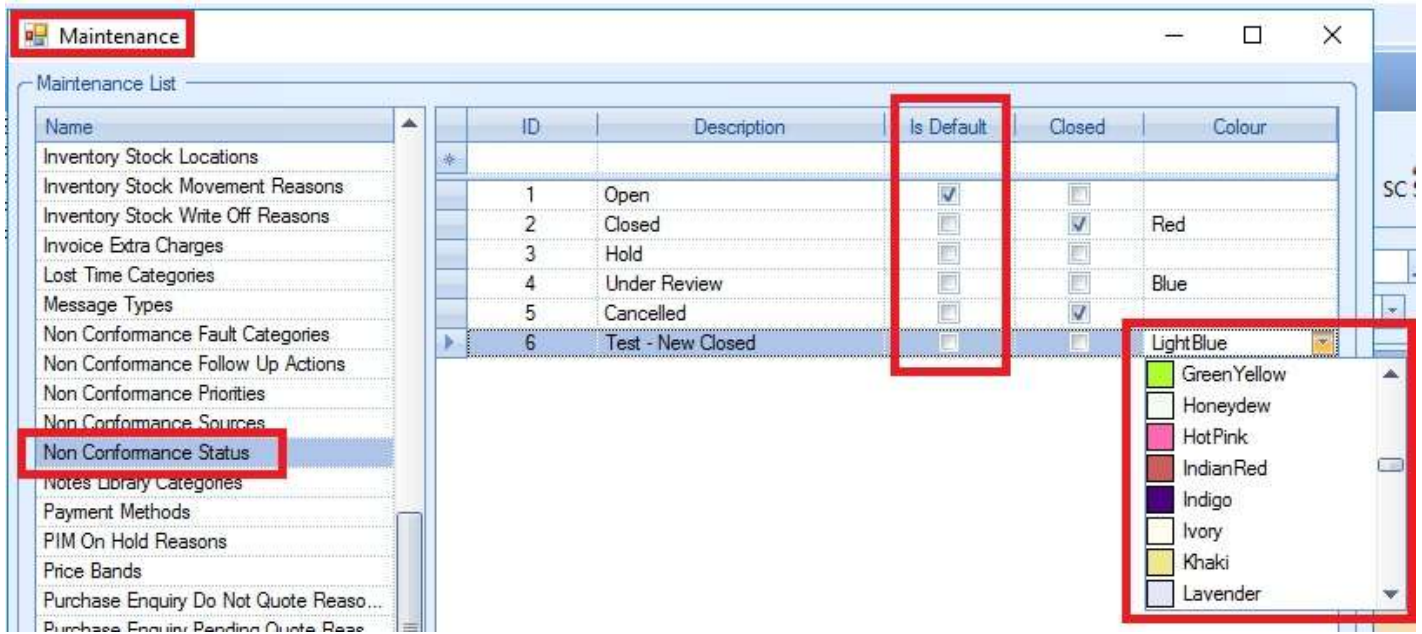
Drag a column header here to group by that column.

Tool Record	Status	Description	Responsible	Total Issued	Total Usage	Usage Since Valid	Issued Since Valid
16	Open	M22 x 1.5 6g Set Plug Thread Gage ...	Harry Hodgson	6	260	220	5
15	Open	Wrist-Mountable Multiple Echo Ultraso...	Harry Hodgson	2	20	20	2
17	Open	JW3208 Optical Power Meter With FC...	Harry Hodgson	3	12	12	3
5	Open	Bore Micrometer 12-16mm	Harry Hodgson	1	12	12	1
25	Open	Angle Gauge 3 & 4 Deg	Harry Hodgson	1	1	1	1

Quality

Quality - Non-Conformances - Added ability to set default status for NCRs

Added ability to set a default Status to List Maintenance->NC Status. Amended Colour drop down to include the available .Net colours - Ticket 70919 (23/06/2025 11:07)



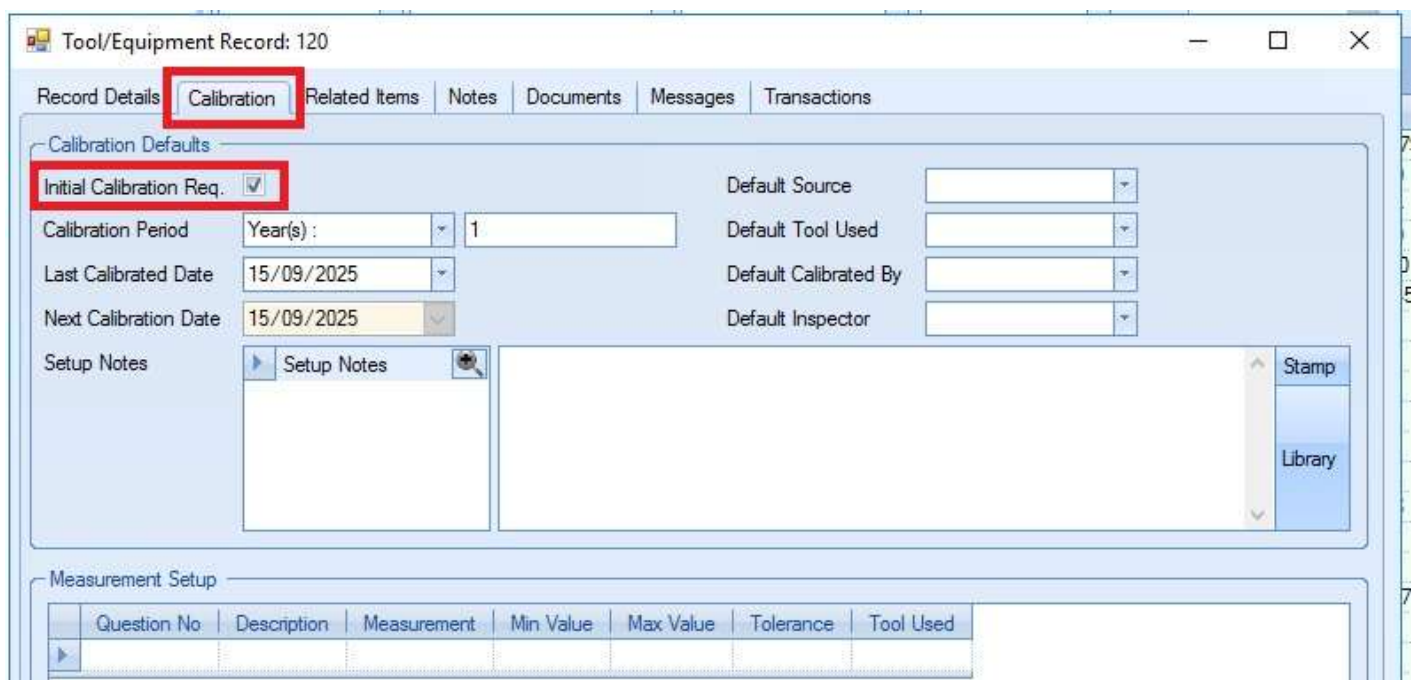
Quality

Quality - Calibration - Option added to indicate initial calibration is required against tool calibration details which defers Next Calibration Date until initial calibration is done

Added Initial Calibration Required checkbox on the Tooling Record, if checked the Next Calibration date is unaffected until Calibration is done on the tool - Ticket 72267 (12/08/2025 10:50)

Initial Calibration Req. When new calibrated T&E records are created, the assumption is that the tool is ready for use, but often the tool will require calibration before it can be used. This option allows the user to record the tool in the system, but mark it as requiring an initial calibration. With this option ticked, the tool will not be available for use until the initial calibration is carried out.


Once a successful calibration has been carried out, this option will be unticked automatically, the LAST and NEXT calibration dates will be calculated accordingly based on the tool's calibration date and period, and the tool will become available for use/issue.







Quality


Quality - Calibration - Filter added to Calibration Browse screen for tool Group Name


Added Group name filter against Calibration Browse - Ticket 72897 (25/08/2025 17:24)


**Calibration**

ViewRefreshExportGrid Options

Grid Filters


Group Name : 

Status : 

Requires Calibration 









Clear

Save

Location : 

15/09/2025

Drag a column header here

Tool Record	I	S	Group Name	Period Length
▶ 114				4 Month(s)
111			▶ Digital Caliper	12 Month(s)
108			Electrical	12 Month(s)
107			New Category	6 Month(s)
105			Plug Gauges	28 Day(s)
103			Screw Ring Gauge	30 Day(s)
97			Slip Gauges	1 Month(s)
96			Smashers	4 Month(s)

Select Group Name...

Group Name



▶ Digital Caliper

Electrical

New Category

Plug Gauges

Screw Ring Gauge

Slip Gauges

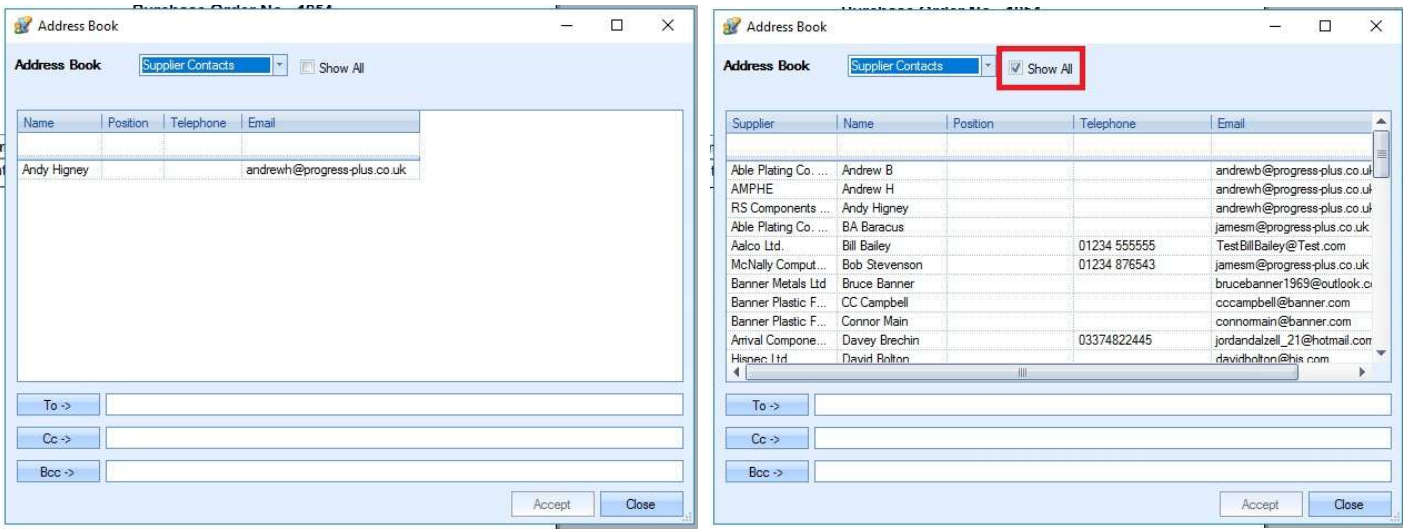
Smashers

Section – Message Centre

Message Centre

IM Centre - Emailing Supplier/Customer Contacts - Option added to view all contacts, including those not associated with customer/supplier

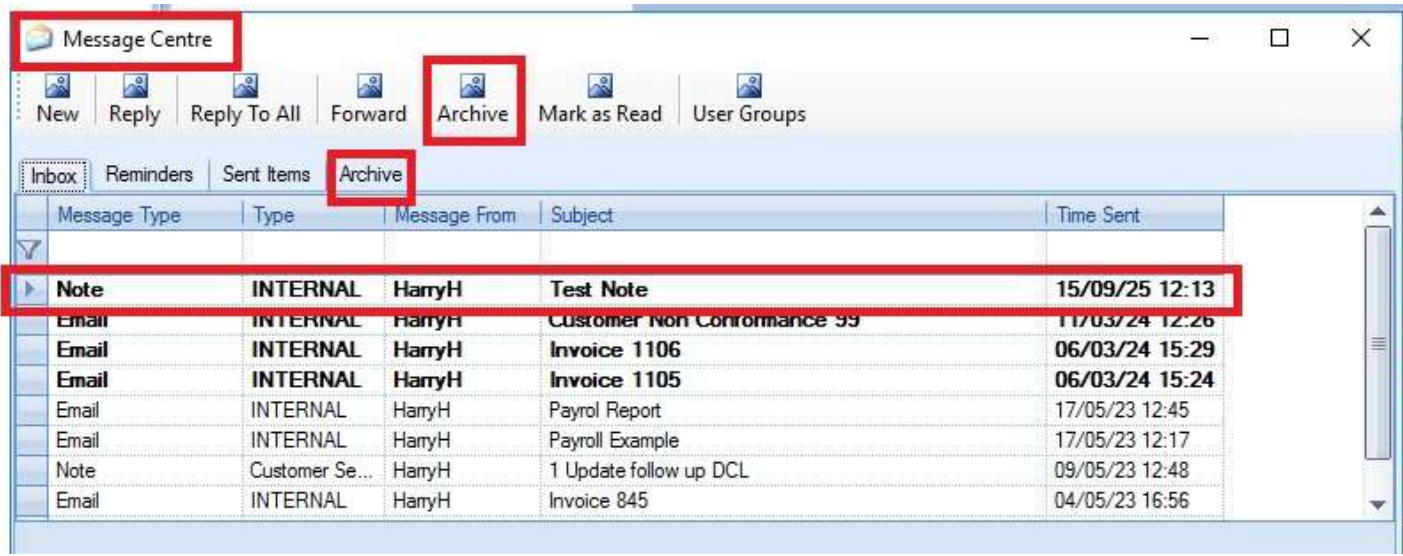
Added Show All checkbox on the Message Contact form for Customer/Supplier Contacts - Request for all contacts to show when the user wants to pick a contact from out with the Customer/Supplier they are sending the email too - Ticket 70788 (17/06/2025 11:19)



Message Centre

Message Centre - Notes - Added ability to archive notes

Added ability to Archive Notes - Ticket 72923 (25/08/2025 13:39)



Section – Reports

Reports

Reports - Inventory Return To Suppliers report - Filter added for Supplier Family

Inventory Reports: - Inventory Return To Suppliers report: - Added Supplier Family as a filter – Ticket 59971 (08/07/2024 10:22)

Reports

Quick Search

Inventory

Future Stock (Demand Only)

Future Stock (General)

Future Stock Shortages

Future Stock Surplus

Inventory Average Cost

Inventory Manufactured Part Profit

Inventory Purchased Part Profit

Inventory Return To Suppliers

Inventory Routing Details

Inventory Stock Issues

Inventory Stock Issues (No Prices)

Inventory Stock Receipts

Inventory Stock Receipts With Values

Inventory Stock Status

Inventory Stock Take

Inventory Where Used

Inventory With Default Customer

Inventory With Preferred Supplier

Parts Exceeding Maximum Stock Level

Parts Where Routing Lead Times Exceed M

Price List

Price List (By Part No)

Price List with Inventory Selling Price

Reports

Report Options

Options

Required Data

Quick Date Range

Last 12 Months

Caption	Operator Type	Value
Issue Date From	>=	18/11/2023
Issue Date To	<=	18/11/2024

Filter Data

Caption	Operator Type	Value
PO Line Status		
Purchase Order No		
Supplier		
Supplier Family		

Sort Data

Reports

Reports - Top Selling Parts report - Totals added to report

Invoice Reports: - Top Selling Parts Report - Added Totals – Ticket 60866 (31/07/2024 11:06)

Reports

Quick Search

Invoice Analysis By Part Number - Period Comparison

Invoice Detail

Invoice General Group By

Invoice Nominal Analysis

Invoice Profitability Analysis

Invoice Profitability Analysis (Basic)

Invoice Profitability Analysis (Top Selling Parts)

Invoice Profitability By Customer

Invoice Profitability By Customer Detail

Invoice Profitability By Group Code

Invoice Profitability By Group Code Detail

Invoice Profitability By Part No

Invoice Profitability By Part No Detail

Invoice Profitability By Project

Invoice Profitability By Project Detail

Invoice Profitability Group By

Invoice Schedule

Invoice Summary Report

Invoiced & Ordered By Customer

Projected Invoice Turnover

Projected Invoice Turnover By Customer

Projected Invoice Turnover By Month

Projected Invoice Turnover By Month Grouped By

Top Selling Parts

Labour

Reports

Report Options

Options

Required Data

Quick Date Range

Last 12 Months

Caption	Operator Type	Value
Invoice Date From	>=	18/11/2023
Invoice Date To	<=	18/11/2024
Top N	=	10

Filter Data

Caption	Operator Type	Value
---------	---------------	-------

Sort Data

Top Selling Parts

Invoice Date From >= 18/11/2023 AND Invoice Date To <= 18/11/2024 AND Top N = 10

Part No: Description	Qty	Value
142: Top Level Assembly	3,838	140,985.00
170: Engine Protector (Skid Plate) Extreme Sports Model 8mm	906	131,341.25
166: Engine Protector (Skid Plate) Sports Model	682	113,430.00
165: Drilled Disk version 2023 Version 1 Includes Chrome DIP	1,944	54,370.00
157: Drilled Disk	1,187	51,729.00
163: Universal Gear - 40056	287	45,600.00
164: Drilled Disk version 2023 Includes Chrome DIP	914	35,990.00
180: Auto Assembly Motor	1,084	34,470.00
Engine Baffle: Engine Baffle Sports Model	838	27,380.00
168: Auto Assembly Tier One	1,620	26,825.00
Total	13,300	662,120.25

---- End Of Report ----

Reports

Reports - Work Order Material Traceability reports - Batch No. column added to reports

Work Order Material Traceability with PO: - Added Batch No to report – Ticket 61041 (07/08/2024 9:22)

Inventory

Invoicing

Labour

Mac

PI Matching

Projects

Purchasing

Quality

Sales Orders

Work Orders

Material Traceability by WO No

Material Traceability by WO No Showing PO

Material Traceability for WO No 52076 Showing PO

Top Level Part No 183

Drawing No

WO Qty 25 Each

Report Options

Options

Required Data

Caption	Operator Type	Value
WO No	=	52076

Description

GRN No

Issue Qty

Supplier

Batch No

PO No

Advice Note

Universal Gear - 40056						
mm x 254mm x 127mm						
Steel Blocks 10" x 10" x 5"	9548/2	25 kg	Richard Austin Alloys	455221	1699/2	RAA151124

Reports

Reports - Purchasing reports (various) - Filter added for Proforma Paid

PO Reports: - Proforma Paid filter added – Ticket 61045 (07/08/2024 9:39)

The screenshot shows the 'Purchasing' menu on the left with a red box highlighting the 'PO OS' option. On the right, the 'Report Options' dialog box is open, showing the 'Options' tab. A red box highlights the 'Filter Data' section, which contains a table with the following data:

Caption	Operator Type	Value
Proforma Paid	=	True

Reports

Reports - Invoice Detail report - New filter added for NET value

Progress Reports: - Invoice Detail Report: - Net Value Filter – Ticket 63526 (07/10/2024 9:59)

Reports

Progress Reports: - WO Material Outstanding report: - FI Material filter looks at the WO BOM Item not the Part Detail record. – Ticket 63144 (07/10/2024 11:02)

The screenshot shows the 'Reports' window with the 'WO Material Outstanding' report selected. The 'Report Options' dialog box is open, showing the 'Options' tab. A red box highlights the 'Filter Data' section, which contains a table with the following data:

Caption	Operator Type	Value
Free Issue	=	True

The main report area displays the 'Material Outstanding' report. The report includes a table with the following data:

ST	WO Part No: Description	SO No	Material: Description	Planned Start	Planned Finish	UOH	O/SBOM Qty	Free Stock	O/SBOM Value	O/SWO Qty	Hrs Booked
	040202: Down Pipe - 80mm Stainless Steel (For Vehicles - EVO 7, 8 MR, 9)		FI TP 001: Free Issue Test Part 001	02/11/23	25/12/23	each	5	0	0	5	0.00
	035011: Support Pin 60mm Stainless Steel	1239/1	FI-770531:	12/04/24	12/04/24	each	50	0	0	50	333.84

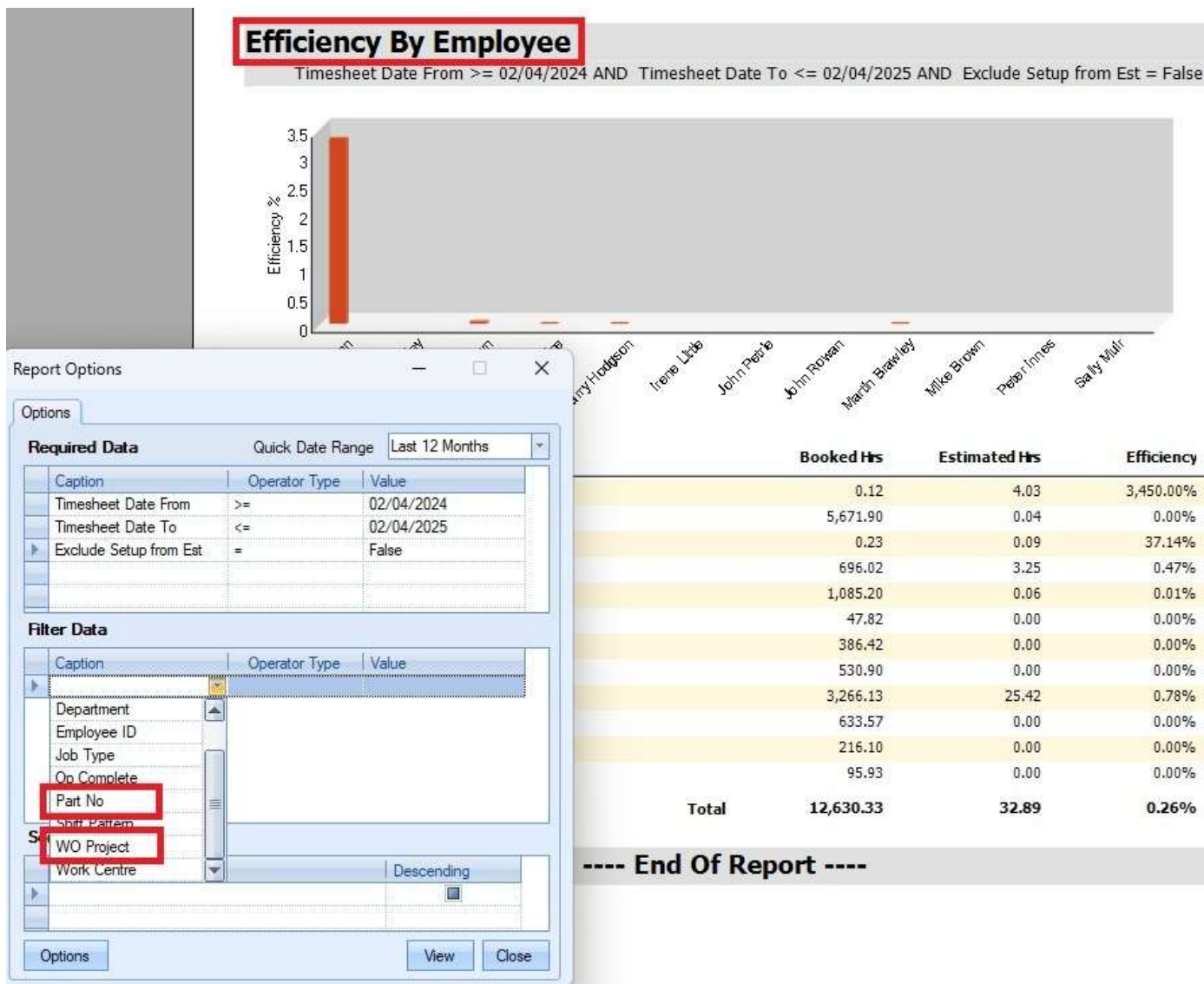
Below the table, there is a summary row: 0

----- End Of Report -----

Reports

Reports - Efficiency By Employee reports - Added filters for part number and project

Efficiency By Employee reports - Added filters for Part No and Project - Ticket 64909 (13/11/2024 9:27)

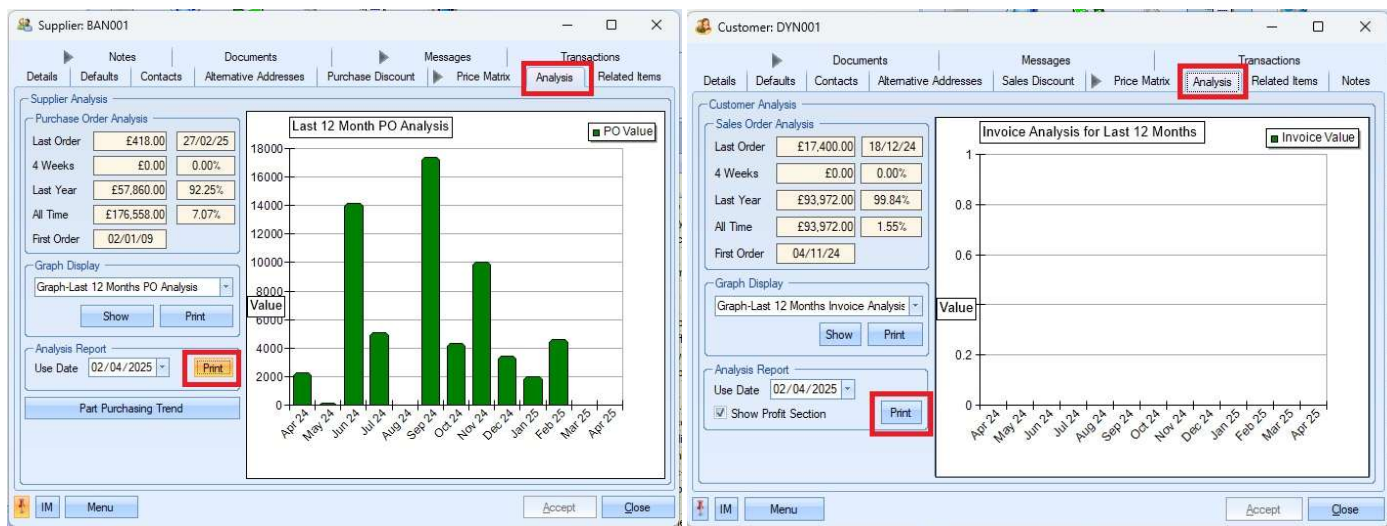


Reports

Reports - Supplier Analysis report - Additional NCR sub-report added

Reports - Customer Analysis report - Additional NCR sub-report added

Added Non Conformance sub report to Customer/Supplier Analysis reports - Ticket 65295 (18/11/2024 14:20)



Non Conformances

NonC No	Source	Date	Order No	Customer/Supplier	Part No	Fault	Reject Quantity	Cost	Reject No	Corrective Action Target Date Actual Date
105		25/02/25	PO 1243/1	BAN001	EC120		2.00	£0.00		
104		25/02/25	PO 1248/2	BAN001	EC120		0.00	£0.00		
100		13/11/24	PO 1222/1	BAN001	EC120		0.00	£0.00		
95		21/08/24	PO 1170/1	BAN001	900132		1.00	£0.00		
93		17/07/24	PO 1171/1	BAN001	900132		3.00	£0.00		
							Total Cost	£0.00		

---- End Of Report ----

Printed On 02/04/2025 15:28

Supplier Analysis, Page 8

Reports

Reports - Stock Check report - Batch No. column added to report

Added Batch No to Stock Check Report (from the Stock check screen) - Ticket 66014 (17/12/2024 17:53)

Stock Check

Grid Filters

Our P/N : Location : Refresh
Group Code : 02/04/2025 AND 02/04/2025 Clear

Results

GRN No	Line
3146	9
3169	20
3303	1
3305	1
3185	1
3286	1
3498	1
3516	1
3521	1
1742	20
2817	1
2847	3
3478	1
3500	1
3169	17
3511	1
3487	1
3147	1
3491	1

Qty Left > 0

Menu

100%

1/42

Save Email Excel

Stock Check

GRN/Line	Part No: Description	Batch No	Location	Current Qty	UOM	New Qty
3146/9	0092233-3882: LED Circuit Board 50mmx20mm	2350/1	Rack 2	10	each	
3169/20	0092233-3882: LED Circuit Board 50mmx20mm	2403/1	Rack 4	30	each	
3303/1	0092233-3882: LED Circuit Board 50mmx20mm	2523/1	Stores	27	each	
3305/1	0092233-3882: LED Circuit Board 50mmx20mm	2529/1	Stores	11	each	
3185/1	035011: Support Pin 60mm Stainless Steel	2386/1	Stores	1	each	
3286/1	035011: Support Pin 60mm Stainless Steel	2571/1	Stores	1	each	
3498/1	035011: Support Pin 60mm Stainless Steel	2354	Stores	6	each	
3516/1	035011: Support Pin 60mm Stainless Steel	478	Stores	1	each	
3521/1	035011: Support Pin 60mm Stainless Steel	2766/1	Stores	2	each	
1742/20	035016: Support Pin 80mm Stainless Steel	987/1	Stores	159	each	
2817/1	035016: Support Pin 80mm Stainless Steel	1971/1	Stores	6	each	
2847/3	035016: Support Pin 80mm Stainless Steel	2068/1	Stores	4	each	
3478/1	040138: Down Pipe - 75mm Stainless Steel (For Vehicles - PS, RPS13 / S14)		Auto Boss Stores	6	each	
3500/1	040142: Down Pipe - 80mm Stainless Steel (For Vehicles - PS, RPS13 / S14)		Auto Boss Stores	6	each	

Reports

Reports – Invoice Profitability report - New sort option added for Actual Profit

Added "Actual Profit" sort option to Invoice Profitability Analysis and Invoice Profitability Analysis (Basic) - Ticket 66571
(09/01/2025 10:02)

Invoice Profitability Analysis

Invoice Date From >= 14/04/2024 AND Invoice Date To <= 14/04/2025 AND Costs for Each WO Level = False Actual Profit DESC

Invoice	Date	SO
1372/1	04/02/25	136
1382/2	21/02/25	137
1357/3	17/01/25	135
1266/1	27/08/24	120
1390/3	04/03/25	139
1383/2	24/02/25	139
1256/1	22/08/24	120
1270/2	03/09/24	122
1357/2	17/01/25	135

Report Options

Options

Required Data

Quick Date Range

Last 12 Months

Caption	Operator Type	Value
Invoice Date From	>=	14/04/2024
Invoice Date To	<=	14/04/2025
Costs for Each WO Level	=	False

Filter Data

Caption	Operator Type	Value

Sort Data

Caption	Descending
Actual Profit	

Options

View

Close

	Material	Labour	Subcon	Total	Profit %	Margin
Planned	33,000.00	555.56	0.00	33,555.56	56,444.44	63%
Actual	33,031.67	582.50	0.00	33,614.17	56,385.83	63%
Difference	-31.67	-26.94	0.00	-58.61		
Planned	8,000.00	1,233.33	0.00	9,233.33	25,766.67	74%
Actual	8,000.00	1,261.50	0.00	9,261.50	25,738.50	74%
Difference	0.00	-28.17	0.00	-28.17		
Planned	8,000.00	3,000.00	0.00	11,000.00	24,000.00	69%
Actual	8,000.00	3,159.17	0.00	11,159.17	23,840.83	68%
Difference	0.00	-159.17	0.00	-159.17		
Planned	6,500.00	1,200.00	0.00	7,700.00	19,300.00	71%
Actual	5,203.29	1,181.53	0.00	6,384.82	20,615.18	76%
Difference	1,296.71	18.47	0.00	1,315.18		
Planned	5,000.00	770.83	0.00	5,770.83	16,104.17	74%
Actual	5,000.00	1,020.67	0.00	6,020.67	15,854.33	72%
Difference	0.00	-249.84	0.00	-249.84		
Planned	350.00	0.00	1,500.00	1,850.00	13,150.00	88%
Actual	450.00	0.00	1,500.00	1,950.00	13,050.00	87%
Difference	-100.00	0.00	0.00	-100.00		
Planned	4,333.33	800.00	0.00	5,133.33	12,866.67	71%
Actual	4,379.07	806.42	0.00	5,185.49	12,814.51	71%
Difference	-45.74	-6.42	0.00	-52.16		
Planned	300.00	216.67	0.00	516.67	11,483.33	96%
Actual	300.00	230.00	0.00	530.00	11,470.00	96%
Difference	0.00	-13.33	0.00	-13.33		
Planned	1,250.00	1,000.00	0.00	2,250.00	10,250.00	82%

Invoice Profitability Analysis (Basic)

Invoice Date From >= 14/04/2024 AND Invoice Date To <= 14/04/2025 AND Costs for Each WO Level = False Actual Profit

Invoice	Date	SO No	Customer	SalesValue	Total Cost	Profit % Margin
1389/1	04/03/25	1394/1	ENG123: En	4,422.00	14,023.33	-9,601.33 -217%
1389/2	04/03/25	1394/1	ENG123: En	4,422.00	13,802.50	-9,380.50 -212%
1404/2	04/04/25	1413/4	ENG010: Bla	6,825.00	15,781.58	-8,956.58 -131%
1342/3	10/12/24	1336/4	ENG123: En	15,000.00	23,096.67	-8,096.67 -54%
1321/1	06/11/24	1288/4	NEW101: Ne	15,000.00	22,965.00	-7,965.00 -53%
1408/1	09/04/25	1414/5	ENG002: En	4,261.50	12,223.33	-7,961.83 -187%
1402/3	01/04/25	1413/5	ENG010: Bla	4,261.50	11,263.33	-7,001.83 -164%
1330/3	20/11/24	1311/3	LON001: Lo	2,750.00	8,476.17	-5,726.17 -208%
1324/3	12/11/24	1300/3	ARG001: Ar	3,000.00	7,665.84	-4,665.84 -156%
1221/1	04/07/24	704/1	AMER01: Bi	870.00	4,700.00	-3,830.00 -440%
1398/1	18/03/25	1399/1	NEW101: Ne	5,489.00	9,087.21	-3,598.21 -66%
1398/2	18/03/25	1399/2	NEW101: Ne	7,000.00	9,168.25	-2,168.25 -31%
1358/1	17/01/25	1365/1	ARG201: Ar	500.00	2,297.33	-1,797.33 -359%
1286/2	17/09/24	1263/1	ENG010: Bla	10,490.00	12,198.37	-1,708.37 -16%
1410/1	10/04/25	1414/3	ENG002: En	4,900.00	6,593.50	-1,693.50 -35%
1146/6	22/04/24	1149/1	NEW101: Ne	1,800.00	3,390.67	-1,590.67 -88%
1339/1	06/12/24	1339/1	ENG010: Bla	1,000.00	2,553.75	-1,553.75 -155%
1404/1	04/04/25	1413/3	ENG010: Bla	4,900.00	6,450.00	-1,550.00 -32%
1272/6	03/09/24	1245/6	ARG001: Ar	0.00	1,509.71	-1,509.71 0%
1303/2	04/10/24	1279/1	ENG010: Bla	1,170.00	2,349.50	-1,179.50 -101%
1361/1	22/01/25	1367/1	SCO101: Sco	840.00	1,989.42	-1,149.42 -137%
1324/2	12/11/24	1300/2	ARG001: Ar	700.00	1,843.33	-1,143.33 -163%
1367/1	31/01/25	727/1	AMER01: Bi	216.39	1,348.43	-1,132.04 -523%
1183/3	28/05/24	1159/2	ENG123: En	1,750.00	2,866.67	-1,116.67 -64%

Reports

Reports – Inventory Stock Take report - New filter added for Active Stock

Reports:- Inventory Stock Take Report :- Added Active Stock Filter - Ticket 66700 (15/01/2025 9:41)

Inventory Stock Take

Include Obsolete = False AND Active Stock > 0

Part No: Description	Supply	Quar	Demand SO	Alloc	Surplus/Shortage
0092233-3882: LED Board 50mm x 20mm		0	0	0	78
035011: Support Pipe Stainless Steel		0	22	0	22
035016: Support Pipe Stainless Steel		0	6	6	163
040138: Down Pipe Stainless Steel (For PS, RPS13 / S14)		0	1	0	15
040142: Down Pipe Stainless Steel (For PS, RPS13 / S14)		0	0	0	16
040178: Down Pipe Mild Steel - Heat Treated Vehicles - EVO 4, 5		0	1	0	38
040183: Down Pipe Mild Steel - Heat Treated Vehicles - EVO 4, 5		0	10	0	11
040201: Down Pipe 75mm Stainless Steel		0	0	0	20

Report Options

Options

Required Data

Caption	Operator Type	Value
Include Obsolete	=	False

Filter Data

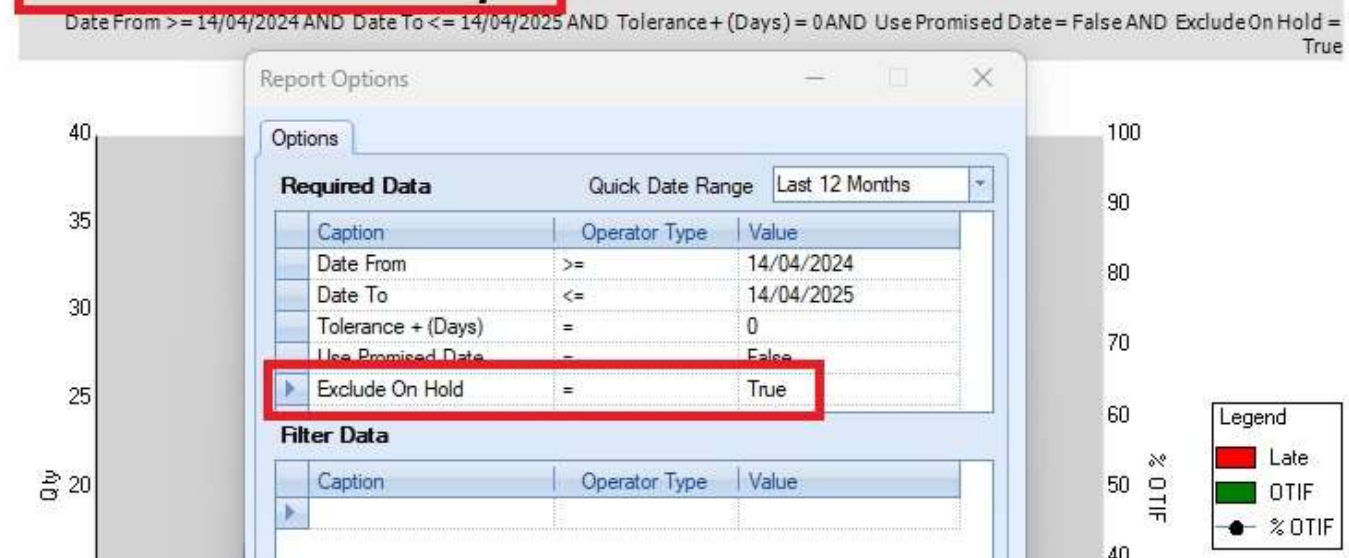
Caption	Operator Type	Value
Active Stock	>	0

Reports

Reports – SO On Time In Full report – New filter added for Exclude On Hold

Reports :- SO On Time In Full - "Exclude On Hold" filter added - Ticket 66856 (23/01/2025 9:39)

SO On Time In Full Analysis



Reports

Reports - Tooling & Equipment Issue report - Added filter for Issued To employee

Added Issued To as filter on Tooling/Equipment issues report - Ticket68362 (24/03/2025 13:03)

Tooling/Equipment Issues

Issue Date From >= 21/04/2024 AND Issue Date To <= 21/04/2025 AND Issued To = Alberto Dickson

Tool No	Description	Status	WO/Op	Op Description	Issue Date	Issued By	Return Date	Returned By	Planned Issue	Return Reason
112	0-600mm	Open	52387/10	Assembly	21/04/25 11:44	Harry Hodgson			<input type="checkbox"/>	
					26/02/25 12:19	Maria Pearson	26/02/25 12:21	MariaP	<input type="checkbox"/>	

Report Options

Options

Required Data

Quick Date Range Last 12 Months

Caption	Operator Type	Value
Issue Date From	>=	21/04/2024
Issue Date To	<=	21/04/2025

Filter Data

Caption	Operator Type	Value
Issued To	=	Alberto Dickson

End Of Report ----

Reports

Reports - Employee Certification (Active) report - New report added to list active employee certifications

Added new report Employee Certification (Active): similar to Employee Certification but only shows the 'Active' certs (renewal date >= today) - Ticket 67338 (27/03/2025 12:56)

Employee Certification (Active)

Employee	Certification Title	Valid From	Renewal Date	Missing
Edward McCafferty	Degree	21/01/21	21/01/21	<input type="checkbox"/>
Harry Hodgson	Degree	04/05/23	04/05/23	<input type="checkbox"/>
Joe Smythe	Logistics Operations	05/09/23	05/09/25	<input type="checkbox"/>
Joe Smythe		08/12/22	08/12/22	<input type="checkbox"/>
Joe Smythe	Degree	08/12/22	08/12/22	<input type="checkbox"/>
Julie Brown	Degree	05/07/23	05/07/23	<input type="checkbox"/>
Steve Austin	Logistics Operations	07/06/23	07/06/25	<input type="checkbox"/>
Steven Wilson	CAD	14/04/25	14/04/26	<input type="checkbox"/>

End Of Report ----

Reports

Reports - WO Op Status reports - Overbooked operations now shown with red text to highlight

WO Op Status Reports: - If an Op has time overbooked show text in red - Ticket 68522 (31/03/2025 13:29)

WO Op Status Report

Outstanding Only = True AND Show WO Notes = False AND Show Internal Notes = False

WO No	Part No: Description	Qty (OS)	Master WO SO No	Start Date	Due Date	SO Req'd Date	Op - WC - Time OS - Qty Booked - Status				
50548	Test Unplanned Actual: Test Unplanned Actual	10 (9)		06/06/22	07/06/22	161	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov			
50554	3636634GH: Compressor Delivery Casing	1	681/2	17/06/22	23/06/22	10/06/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50556	P1000065217: 90° CLAD BEND	1	675/2	20/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50557	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50558	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50559	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50560	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50561	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50562	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50563	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50564	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50565	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50566	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	
50567	P1000065217: 90° CLAD BEND	1	675/2	22/06/22	21/08/22	21/08/22	10M - Spool SW 0.12h - 10 Nov	900 Manual Lame +0.15h - qty 2 - 10 Nov	30 Manual Ops 0.5h	40 Inspection 0h	

Printed On 21/04/2025 12:13

Colour Coding:

Not Started ☐ Subcon Op ☐

WIP ☐ Complete ☐

Subcon Op is WIP if a PO has been raised and not fully receipted.
Op is WIP if either Time or Qty have been booked, or the Op is currently being booked to in SFDC. Time Over Booked

WO Op Status Report. Page 1

Reports

Reports - Stock Below Minimum stock level - Filter added for minimum stock level and maximum stock level

Reports :- Stock Below Minimum Level Report: - Additional Filters – Min Stock Level & Max Stock Level - Ticket 69006 (14/04/2025 10:19)

Stock Below Minimum Stock Level

Include Obsolete = False AND Include Future = False AND Minimum Stock Level > 10 AND Maximum Stock Level < 100

Group Code	Carriage	UOM	Default Location	Current Stock	ROQ	MSL	On Order (SO)	On Order (PO)	On Order (WO)	Qty Below MSL
Part No: Description										
1: Safety Gloves		each	Stores	97	0	100	0	0	0	3
NITREX 270E Work and Safety Gloves, Bag of 10 Pairs - General Handling Gloves with Polyester Liner and Foam Nitrile Palm Coating in Grey, Size 9										
Group Code	Electronic	UOM	Default Location	Current Stock	ROQ	MSL	On Order (SO)	On Order (PO)	On Order (WO)	Qty Below MSL
Part No: Description										
NPEC120: RS PRO Plastic Round End Cap, Type 3 Strut Profile		each	Stores	0	0	150	0	0	0	150
Group Code	Sales	UOM	Default Location	Current Stock	ROQ	MSL	On Order (SO)	On Order (PO)	On Order (WO)	Qty Below MSL
Part No: Description										
PPE38323: Plastic screen mask protectors		each	Stores	0	0	500	0	0	0	500
Group Code	Sales - Auto Boss	UOM	Default Location	Current Stock	ROQ	MSL	On Order (SO)	On Order (PO)	On Order (WO)	Qty Below MSL
Part No: Description										
050300: A/F Meter Stainless Steel Install Kit - Includes Bung, Washer & Plug Bolt		each	Auto Boss Stores	5	0	50	0	0	45	45
050301: A/F Meter Stainless Steel Install Kit Bung		each	Auto Boss Stores	4	0	20	0	0	100	16
050302: A/F Meter Stainless Steel Install Kit Washer		each	Auto Boss Stores	31	0	40	0	0	80	9
050321: A/F Meter Mild Steel (Heat Treated) Install Kit Bung		each	Auto Boss Stores	2	0	100	25	27	0	98
050323: A/F Meter Mild Steel (Heat Treated) Install Kit Plug Bolt		each	Auto Boss Stores	6	0	40	0	14	0	34

---- End Of Report ----

Reports

Reports - Tooling/Equipment Issue - Added filters for Master WO, Master WO SO, WO Project, WO Department, Job type

Added additional filters on Tooling/Equipment Issues report (Master WO, WO Project, Master WO SO, WO Department, Job Type) Ticket 68614 – (08/04/2025 17:56)

Reports

Quick Search

- Enquiries
- Inventory
- Invoicing
- Labour
- Misc
- PI Matching
- Projects
- Purchasing
- Quality
 - Calibration Detail
 - Calibration Due
 - Non Conformance Action
 - Non Conformance By Fault Category
 - Non Conformance By Fault Category Detail
 - Non Conformance By Source
 - Non Conformance By Source Detail
 - Non Conformance By Work Centre
 - Non Conformance By Work Centre Detail
 - Non Conformance Detail
 - Non Conformance Detail By Month
 - Non Conformance Grouped By
 - Non Conformance Summary
 - Non Conformance Trend Analysis
 - Non Conformance Type Grouped By
 - Scrap Analysis
 - Scrap Analysis Graph
 - Scrap Booked vs Booked Qty
 - Scrap Summary
 - Technical Query General
 - Tooling/Equipment Issues**
 - Tooling/Equipment Used In
- Sales Orders

Today

Customers

Reports

Print 100%

1/1

Tooling/Equipment Issues

Report Options

Options

Quick Date Range Last 12 Months

Caption	Operator Type	Value
Issue Date From	>=	04/06/2024
Issue Date To	<=	04/06/2025

Filter Data

Caption	Operator Type	Value
Job Type		
Last Calibrated		
Location		
Master WO		
Master WO SO		
Responsible		
Returned By		
Status	Descending	

Options View Close

Status	WO/Op	
Open	2865/10	T
Open	2867/40	C
	2864/10	
	2863/10	F
	2863/10	F
	2863/10	F
	2861/10	F
Open	2836/10	
Open	2835/20	T
Open	2861/10	F
	2829/40	F
Open	2839/10	
	2839/10	
Open		

Reports

Quick Search

- Enquiries
- Inventory
- Invoicing
- Labour
- Misc
- PI Matching
- Projects
- Purchasing
- Quality
 - Calibration Detail
 - Calibration Due
 - Non Conformance Action
 - Non Conformance By Fault Category
 - Non Conformance By Fault Category Detail
 - Non Conformance By Source
 - Non Conformance By Source Detail
 - Non Conformance By Work Centre
 - Non Conformance By Work Centre Detail
 - Non Conformance Detail
 - Non Conformance Detail By Month
 - Non Conformance Grouped By
 - Non Conformance Summary
 - Non Conformance Trend Analysis
 - Non Conformance Type Grouped By
 - Scrap Analysis
 - Scrap Analysis Graph
 - Scrap Booked vs Booked Qty
 - Scrap Summary
 - Technical Query General
 - Tooling/Equipment Issues**
 - Tooling/Equipment Used In
- Sales Orders

Today

Customers

Reports

Print 100%

1/1

Tooling/Equipment Issues

Report Options

Options

Quick Date Range Last 12 Months

Caption	Operator Type	Value
Issue Date From	>=	04/06/2024
Issue Date To	<=	04/06/2025

Filter Data

Caption	Operator Type	Value
Responsible		
Returned By		
Status		
Tool No		
Tool Serial No		
WO Department		
WO Project	Descending	

Options View Close

Status	WO/Op	
Open	2865/10	
Open	2867/40	
	2864/10	
	2863/10	
	2863/10	
	2863/10	
	2861/10	
Open	2836/10	
Open	2835/20	
Open	2861/10	
	2829/40	
Open	2839/10	
	2839/10	

Reports

Reports - Stock Below Minimum stock level - Filter added for minimum stock level and maximum stock level

Reports: - Stock Below Minimum Stock Level: - Added a filter for Minimum Stock level - Ticket 68859 (04/04/2025 10:20)

The screenshot shows the 'Reports' application interface. On the left, a list of reports is displayed, with 'Stock Below Minimum Stock Level' highlighted. The main window shows the 'Report Options' dialog box for this report. The 'Options' tab is active, showing 'Required Data' and 'Filter Data' sections. The 'Filter Data' section has a red box around the 'Minimum Stock Level' filter, which is set to '>' with a value of '10'. The 'Sort Data' section is also visible, showing 'Caption' and 'Descending'.

Caption	Operator Type	Value
Include Obsolete	=	False
Include Future	=	False

Caption	Operator Type	Value
Minimum Stock Level	>	10

Caption	Descending

Reports

Reports - Invoice General Group By - Filter amended to include or exclude Contract No

Reports: - Invoice General Group by Report: - Contract No filter amended to Include or exclude Contract No's - Ticket 68861 (04/04/2025 10:02)

The screenshot shows the 'Reports' application interface. On the left, a list of reports is displayed, with 'Invoice General Group By' highlighted. The main window shows the 'Report Options' dialog box for this report. The 'Options' tab is active, showing 'Required Data' and 'Filter Data' sections. The 'Filter Data' section has a red box around the 'Contract No' filter, which is set to '<>' with a value of 'ABC12344'. The 'Sort Data' section is also visible, showing 'Caption' and 'Descending'.

Caption	Operator Type	Value
Invoice Date To	<=	04/06/2025
Group By #1	=	N/A
Group By #2	=	N/A
Group By #3	=	N/A
Hide Detail	=	False

Caption	Operator Type	Value
Contract No	<>	ABC12344

Caption	Descending

Reports

Reports - SO Analysis reports - Added filter for default Sales Rep

Reports: - SO Analysis & SO Analysis 5 Year Comparison: - Added Default Sales Rep Filter - Ticket 70466 (02/06/2025 13:22)

The screenshot shows the 'Reports' application interface. On the left, a tree view under 'Sales Orders' has 'SO Analysis' selected. The 'Report Options' dialog box is open, showing 'Required Data' with 'Date From' as 09/07/2024 and 'Date To' as 09/07/2025. The 'Filter Data' section has 'Sales Rep (Default)' set to 'Andy Higney'. The 'Sort Data' section is set to 'Caption' and 'Descending'. On the right, a summary report is displayed with the following data:

Group Code Family	Value	Sales Total: £464,350.25
N/A	464,350.25	
Total	464,350.25	
Customer	Value	Sales Total: £464,350.25
ENG123: Engineering UK Wide	357,082.50	
ENG010: Blacks Engineering	107,179.25	
LIN001: Lincoln Engineering	88.50	
Total	464,350.25	
Department	Value	Sales Total: £464,350.25
Spares	438,211.75	
Purchasing	22,500.00	
Sales	3,550.00	
N/A	88.50	
Total	464,350.25	
Sector	Value	Sales Total: £464,350.25
General Engineering	464,261.75	
N/A	88.50	
Total	464,350.25	
Area	Value	Sales Total: £464,350.25
England	464,350.25	
Total	464,350.25	
Sales Rep	Value	Sales Total: £464,350.25
Andy Higney	464,261.75	
Steven Wilson	88.50	
Total	464,350.25	
Country Code	Value	Sales Total: £464,350.25
GB	357,082.50	
UK	107,267.75	

The screenshot shows the 'Reports' application interface. On the left, a tree view under 'Sales Orders' has 'SO Analysis - 5 Year Period Comparison' selected. The 'Report Options' dialog box is open, showing 'Required Data' with 'Date To' as 09/07/2025. The 'Filter Data' section has 'Sales Rep (Default)' set to 'Andy Higney'. On the right, a detailed report titled 'SO Analysis - 5 Year Period Comparison' is displayed. The report includes a date range filter: 'Date From >= 06/07/2024 AND Date To <= 06/07/2025 AND Group By #1 = N/A AND Group By #2 = N/A AND Group By #3 = N/A AND Hide Detail = False AND Sales Rep (Default) = Andy Higney'. The report data is as follows:

Cust ID	Customer	10/07/20 - 09/07/21	10/07/21 - 09/07/22	10/07/22 - 09/07/23	10/07/23 - 09/07/24	10/07/24 - 09/07/25
ENG010	Blacks Engineering	0.00	0.00	0.00	0.00	107,179.25
ENG123	Engineering UK Wide	0.00	0.00	600.00	248,433.70	357,082.50
LIN001	Lincoln Engineering	0.00	0.00	0.00	0.00	88.50
Group Totals		0.00	0.00	600.00	248,433.70	464,350.25

---- End Of Report ----

Section – SFDC

The features in the section are only available to customers who have the SFDC Module

SFDC

SFDC - SFDC Status - Added Booked Qty to Job Information grid

Added Booked Qty to SFDC Status- Job Information grid - Ticket 60677 (01/08/2024 12:47)

Reports

9997

Created

WIP

PI Matching

Non Conformance

TRAINING_HH001\PROGRESS

Harry_Live

SFDC Status

Portal

Report Reminders (0)

SFDC - HH-BMS Engineering

Previous

Employee: Martin Brawley
Clocked in: 17/07/2024 11:38

Previous

Instruction Notes

WO Status

Feedback Notes

Associated Documents

Inspection Notes

Associated Documents (Booking Ref)

SFDC Status

First Off Inspected

Extra

WO Print

Main Menu

Time: 12:14:22

Job	Started	Booked

SFDC Status

Grid Filters

Employee ID :

Work Centre :

Department :

Date =

18/11/2024

AND

18/11/2024

Refresh

Clear

Time & Attendance

Job Information

On Break

WC Status

Transactions

	ID	Name	Department	Shift	Date On	Time On	WO	Booked Qty	SO (Top Level)
<div></div>	3	Peter Innes	Sales	Standard	30/04/24	08:29:00	2776/10	0.00	1219/1
<div></div>	4	Bob Bradley	Stores	Standard	30/04/24	08:30:00	2774/10	0.00	1219/1
<div></div>	5	Paul McKenzie	Machine Shop	Standard	30/04/24	08:31:00	2790/10	4.00	1223/1
<div></div>	6	Gordon Jardine	Shopfloor	Standard	30/04/24	08:31:00	2783/10	0.00	1219/1
<div></div>	8	Mike Brown	Machine Shop	Standard	30/04/24	10:30:00	2829/10	0.00	0/0
<div></div>	30	Andrew Benson	Sales	Standard	07/08/24	14:19:00	2764/10	1.00	1214/11
<div></div>	30	Andrew Benson	Sales	Standard	26/06/24	11:50:00	2839/10	21.00	0/0
<div></div>	30	Andrew Benson	Sales	Standard	07/08/24	14:33:00	2764/20	0.00	1214/11
<div></div>	35	Graham Prentice	Drawing Office	Standard	30/04/24	10:28:00	2712/10	0.00	0/0
<div></div>	30	Andrew Benson	Sales	Standard	22/07/24	15:57:00	2834/30	0.00	1239/1
<div></div>	1	John Petrie	Fabrication Shop	Standard					
<div></div>	2	John Rowan		Standard					
<div></div>	9	Sally Muir	Sales	Standard					
<div></div>	12	Irene Little	Admin	Standard					
<div></div>	33	Martin Brawley		Standard					
<div></div>	36	Harry Hodgson	Admin	Standard					
	7	David Ellis		Standard					
	10	Mark Wilkinson	Sales	Standard					
	11	James Kepton	Fabrication Shop	Standard					
	12	Stephen Wrightfield	Fabrication Shop	Standard					

ProductiveNon ProductiveOn BreakNot On Job

SFDC

SFDC - Work To List - New option added for Department Work To List

Added WTL by Department button to SFDC - Ticket 66267 (25/02/2025 19:07)

SFDC FA - Berkeley Myles Solutions Ltd

Employee: Gary Anderson
Clocked in: 16/04/2025 12:07

Previous

Holiday Request

Hours Worked

Work To List

Work To List By Department

Extra

Main Menu

SINGLE JOB MODE

Job	Started	Booked

Job Off

Amend Group Job

Book Qty

Op Complete

Pause

Extra

Time: 15:19:43

SFDC - FA - Berkeley Myles Solutions Ltd

WO Num	Part No	Part Description	Machine Name	Setup Plan
52242/10	(32961) LNZG-63_80	TRUNNION SUPPORT (S...		0:00
52248/10	(32961) LNZG-63_80	TRUNNION SUPPORT (S...		0:00
52250/99	(1383372) DSBC-80-160-PPSA-N3	CYLINDER		1:00
52251/10	(32961) LNZG-63_80	TRUNNION SUPPORT (S...		0:00
52260/10	(32961) LNZG-63_80	TRUNNION SUPPORT (S...		0:00
52266/10	(32961) LNZG-63_80	TRUNNION SUPPORT (S...		0:00
52263/10	(32961) LNZG-63_80	TRUNNION SUPPORT (S...		0:00
52259/99	(1383372) DSBC-80-160-PPSA-N3	CYLINDER		1:00
52247/99	(1383372) DSBC-80-160-PPSA-N3	CYLINDER		1:00
52241/99	(1383372) DSBC-80-160-PPSA-N3	CYLINDER		1:00
52243/10	PHONE	test description		1:00

SORT ORDER: -

Grid Options

Currently On Job

Prev Op Complete / First Operation

ID	Employee
314	Gary Anderson

Type of Booking

☐ Setup ☒ Booked

OK

Cancel

SFDC

SFDC - Job Details - Booked Qty and Scrapped Qty now shown when jobbed on

Added Booked and Scrap Qty figures to the Job details box on the SFDC Activity screen - Ticket 67121 (06/02/2025 13:08)

SFDC - FA - Berkeley Myles Solutions Ltd

Job On

Rework

GRN Image

Delivery Image

Op Notes

Extra

Main Menu

SINGLE JOB MODE

Employee: Martin Brawley
Clocked in: 16/04/2025 15:27

Job	Started	Booked
Job:52385/10	16:48	5

WO: Job:52385/10
WO Part No: 145
Part Desc: Sub Assembly 3
WO Qty: 30 WO Qty O/S: 25
O/S Time: 47:55:59
Sch. Start Date: 30/04/2025
Sch. Finish Date: 30/04/2025

Booked Qty: 5 Scrap Qty: 2
Work Centre: 130: Assembly AH
Op Desc:

Job Off

Amend Group Job

Book Qty

Op Complete

Pause

Extra

Time: 16:48:42

SFDC

SFDC - SFDC Status - Added receipt, scrap and issue quantities to SFDC transactions where applicable

Added Qty note to SFDC Transactions - Ticket 67717 (18/03/2025 15:23)

SFDC Status

Grid Filters

WO No : 52385 Work Centre : Refresh

Employee ID : 49 Date Between 21/04/2024 AND 21/04/2025 Clear

Time & Attendance Job Information On Break WC Status Transactions

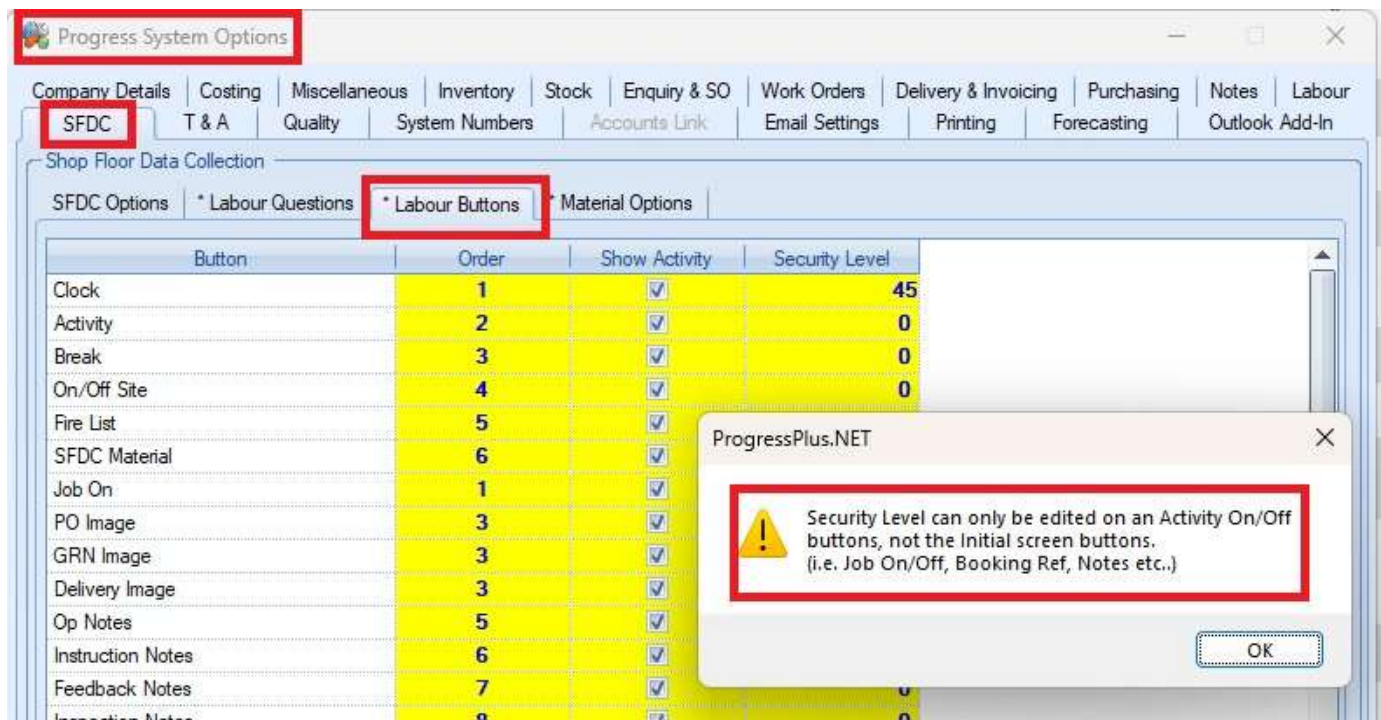
Labour Material

Type	PC	Process ID	Date	Note
Standard	BMS-APPS001	24088	16/04/25 16:49	Martin Brawley jobbed off WO: 52385 Op No: 10 Qty: 0
Standard	BMS-APPS001	24088	16/04/25 16:48	Martin Brawley jobbed on to WO: 52385 Op: 10
Standard	BMS-APPS001	24088	16/04/25 16:48	Martin Brawley jobbed off WO: 52385 Op No: 10 Qty: 0
Standard	BMS-APPS001	24088	16/04/25 16:47	Martin Brawley booked 3 to WO: 52385 Op No: 10 Receipted: 3 Issued: 3 Scrapped: 1
Standard	BMS-APPS001	24088	16/04/25 16:46	Martin Brawley booked 2 to WO: 52385 Op No: 10 Receipted: 2 Issued: 2 Scrapped: 1
Standard	BMS-APPS001	24088	16/04/25 16:44	Martin Brawley jobbed on to WO: 52385 Op: 10

SFDC

SFDC – SFDC Button security – Note added that only ON/ OFF security levels can be changed

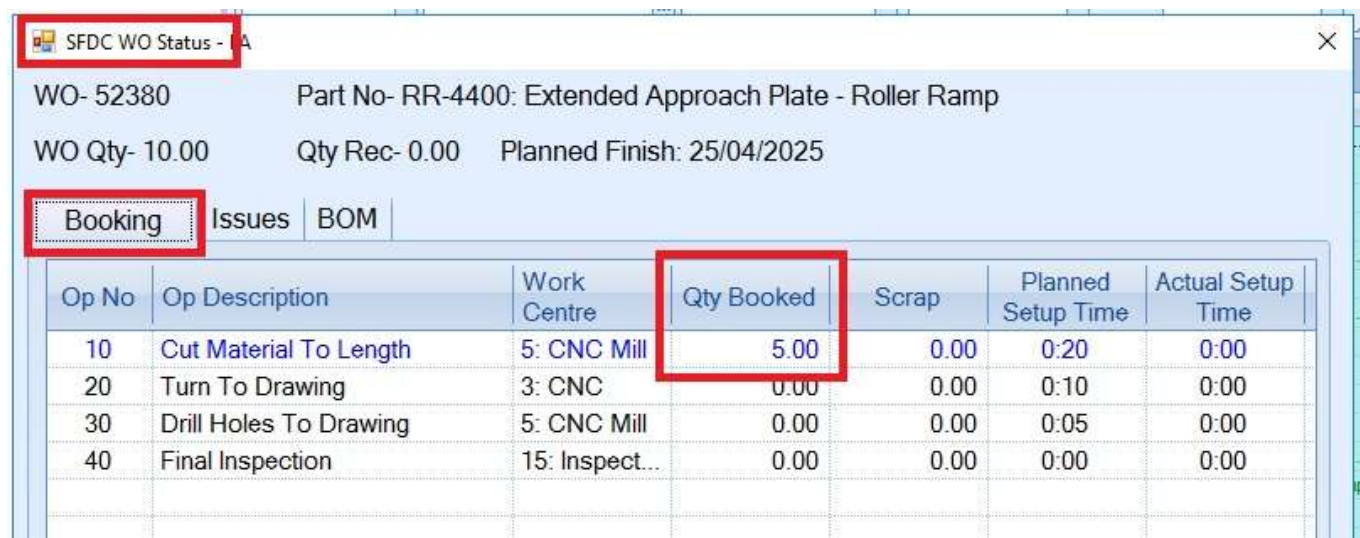
Amended note when editing the Admin->Options->SFDC->SFDC buttons security level to make it clearer that the security level can only be amended on the Activity On/Off buttons and not the initial screen buttons (Clock/Break etc) - Ticket 66570 (16/01/2025 14:20)



SDDC

SFDC – WO Status – Live bookings are now included in the Qty Booked column

Amended WO Status button on SFDC to include "Live Bookings" in the Qty Booked column - Ticket 66689 (15/01/2025 12:40)



SDDC

SFDC - Added booked quantity info to Work To List screen

Added Booked Qty to SFDC Work To List - Ticket 72693 (18/08/2025 13:42)

SFDC - FA - Berkeley Myles Solutions Ltd

WORK CENTRE: Assembly - MACHINE: Steve Austin

WO Num	Part No	Qty Booked	Setup Plan	Run Time Plan	OS Planned	Machine Name	OS
50901/10	79	2	0:15	1:30	1:42		1:70
50902/10	83	0	0:05	1:20	0:00		0:00
50899/10	71	0	0:15	1:00	1:13		1:22
50897/10	79	0	0:15	1:00	0:21		0:35
50895/10	71	0	0:15	1:00	1:15		1:25
51017/10	71	0	0:15	1:00	1:15		1:25
50673/10	Phone ...	0	0:05	76:00	76:05		76:0
50691/10	Phone ...	0	0:05	4:00	4:05		4:08
50692/10	phone ...	0	0:05	4:00	4:05		4:08
50606/10	phone ...	0	0:05	20:00	20:05		20:0

ORDER BY Op Start Date, Priority, SFL Status

Currently On Job

Prev Op Complete / First Operation

Grid Options

Type of Booking

☒ Setup ☐ Booked

OK

Cancel

Section – SFDC Material

The features in the section are only available to customers who have the SFDC Material Module

SFDC Material

SFDC Material- Added vertical scroll bar to details from each of the options - Ticket 60451 (26/09/2024 13:43)

SFDC Material - HH-BMS Engineering

Material Issues Or Sub Contract Receipts are still outstanding on this Work Order

Works Order No2861

UOM: each

WO Qty: 10

Qty Received: 1

WO Qty O/S: 9

Default Location: Stores

Description: Sub Assy 1

UOM: each

Details

Receipt Qty12

LocationStores

No of Labels1

Label Qty12

1

2

3

4

5

6

7

8

9

Yes

No

0

.

/

Menu

Clear

Enter

SFDC Material

SFDC - SFDC Material - Option added to preview WO Job Card document

Added Preview buttons on the SFDC Material->WO Print - Ticket 65678 (28/11/2024 14:38)

SFDC Material HH-BMS Engineering

Available WO to Print. Press MENU to exit

Works Order No2867

Job Card

Material List

Operations List

Preview

Print

Preview

Print

Preview

Print

1

2

3

4

5

6

7

8

9

Yes

No

0

.

/

Menu

Clear

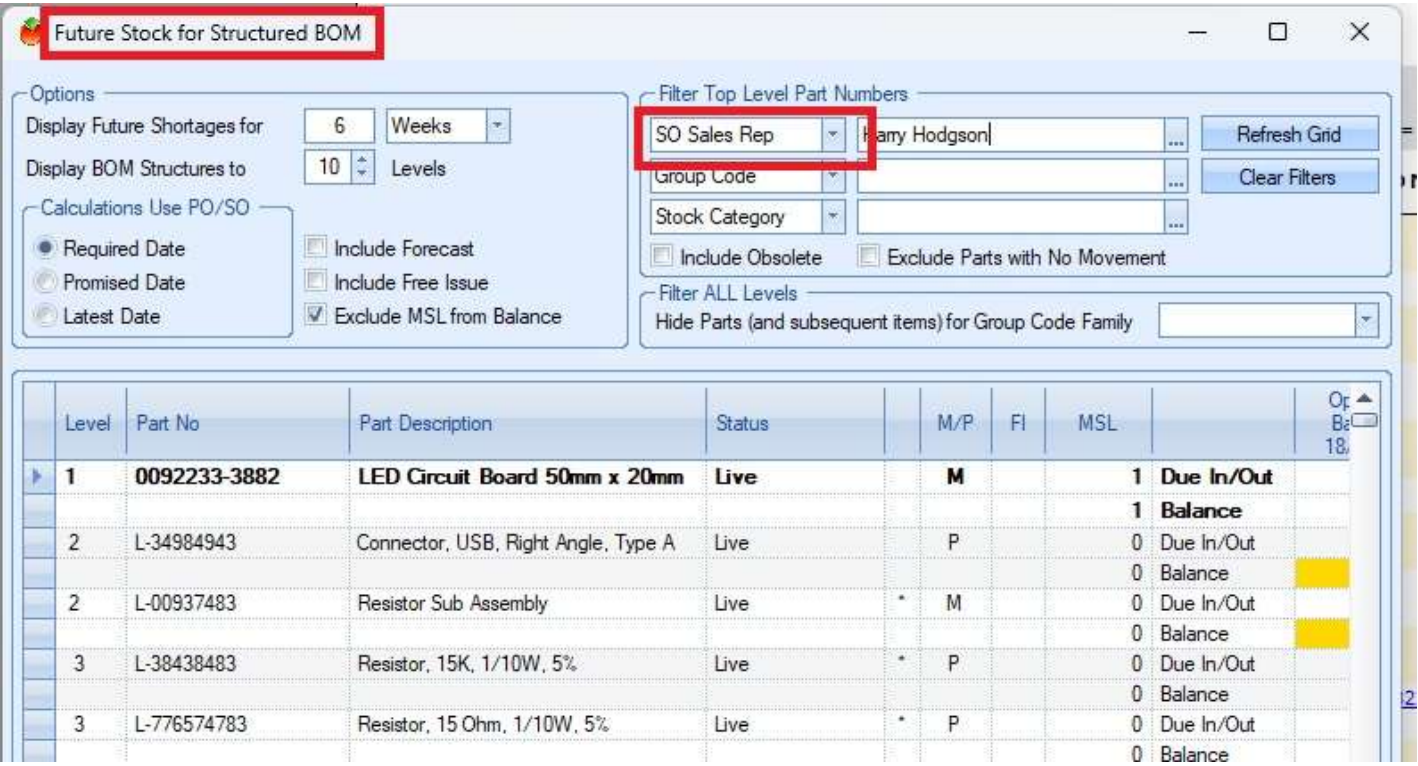
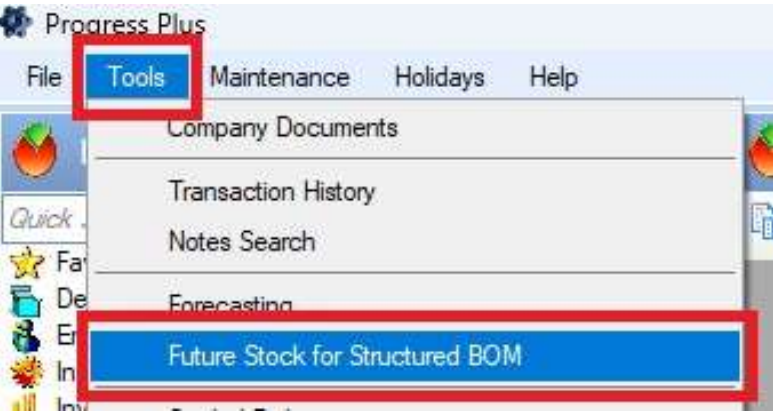
Enter

Section – Tools

Tools

Tools - Future Stock For Structured BOMs - Added filter for SO Sales Rep

Future Stock for Structured BOM screen: - Add SO Sales Rep filter to the top-level part filters - Ticket 58051 (07/08/2024 11:49)



Tools

Tools - Imports - Importing new revisions to inventory records assigns drawing path to revision as well as part master

Inventory Import: - If creating a new Part Revision as part of the import, assign the drawing path to the Revision, as well as the Part No. - Ticket 58255 (02/10/2024 16:40)

Tools

Tools – Transaction History – Export, preview, and print transactions added for reports

Transaction History - Record Reports being Previewed, Exported and Printed - Ticket 66776 (23/01/2025 9:38)

Transaction History

Grid Filters

User: [] Trans Type: [] Refresh

Part No: [] Trans Date >= 09/04/2025 AND 09/04/2025 Clear

Results

Date/Time	Transaction Type	User Name	Related Item(s)	Details
09/04/2025 16:55:14	ReportPrinted	HarryH		Stock Below Minimum Stock Level Report Printed. Filter :- Include Obsolete = False AND Include Future = False
09/04/2025 16:54:55	ReportExported	HarryH		Stock Below Minimum Stock Level Report Exported. Filter :- Include Obsolete = False AND Include Future = False
09/04/2025 16:54:30	ReportPreviewed	HarryH		Stock Below Minimum Stock Level Report Previewed. Filter :- Include Obsolete = False AND Include Future = False

Tools

Tools - Import/Export Data - Supplier ratings, capabilities and certification import/export routines amended to allow user to amend and/or delete existing details

Amended Import/Export for Supplier Ratings, Capabilities and Certifications so the user can export existing data and amend records, also added "Delete?" column to export template so the record can be deleted en-masse - Ticket 67712 (26/03/2025 13:40)

	A	B	C	D	E	F
1	Supplier ID	Group Code	Price	Lead	Quality	Delete?
2	AAL002	Proprietary	5	5	5	FALSE
3	BEVAN	Alu	0	0	0	FALSE
4	ABB002	Alu	0	0	0	FALSE
5	ABL001	Alu	4	3	4	YES
6	DOLLAR	Alu	4	4	4	FALSE
7	ABB002	Aluminium products	0	0	0	FALSE
8	DOLLAR	Aluminium products	4	4	4	FALSE
9	RAA001	Aluminium products	0	0	0	FALSE

Import / Export

Import Export

- Contact Notes
- Customer Contacts
- Customers
- Employees
- Group Code Discounts
- Inventory
- Inventory All
- Inventory BOM
- Inventory Price Matrix
- Inventory Routing
- Op Descriptions
- Operation Skills Required
- Operation Tooling Required
- Projects
- Supplier Capabilities
- Supplier Certifications
- Supplier Contacts
- Supplier Ratings**
- Suppliers
- Timesheet Import
- Tooling/Equipment
- WO Planned Start/Finish Dates

Import

Close

Supplier: AAL001

Notes Documents Messages Transactions

Details Defaults Contacts Alternative Addresses Purchase Discount Price Matrix Analysis Related Items

Supplier Defaults

Nominal Code * Country Code * Area: Scotland Sector: Supplier - Metals Delivery Terms Family Name: Metal

Rating Certification Capability

Regular Supplier of the following Group Code

Group Code	Price	Lead	Quality	Rating
Electronic	5	5	5	500

SO Import Details

Supplier: ABL001

Notes Documents Messages Transactions

Details Defaults Contacts Alternative Addresses Purchase Discount Price Matrix Analysis Related Items

Supplier Defaults

Nominal Code * Country Code * Area: Scotland Sector: Supplier - Subcon Delivery Terms Family Name

Rating Certification Capability

Regular Supplier of the following Group Code

Group Code	Price	Lead	Quality	Rating

Tools

Tools - Transaction History - Changes to part and WO routing operation times/qty per cycle now captures before/after values in transaction

Transaction History: - Show to and from values for Part/WO Routing Op Set Up and Run times, and Qty per Cycle. - Ticket 70016 (22/05/2025 9:46)

Transaction History

Grid Filters

User: HarryH Trans Type: Part No: Trans Date = 09/07/2025 AND 09/07/2025 Refresh Clear

Results

Date/Time	Transaction Type	User Name	Related Item(s)	Details
09/07/2025 13:17:12	WOEdited	HarryH	PartNo: 83; WO: 52611	Routing (Op 10).SetUpTime edited from 00:05 to 00:10; Routing (Op 10).QtyPerCycle edited from 1.00 to 2.00; Routing (Op 10).RunTime_PerCycle edited from 00:20:00 to 00:15:00
09/07/2025 13:11:56	PartNoEdited	HarryH	PartNo: EPC1	Routing (Op 20).SetUpTime edited from 00:00 to 30:00; Routing (Op 20).QtyPerCycle edited from 1.00 to 2.00; Routing (Op 20).RunTime_PerCycle edited from 00:01:26 to 00:01:13

Tools

Import / Export - Price Matrices - Ability to delete existing price matrix entries now added

Inventory Price Matrix: - added ability to Delete selected price matrix records en masse. Done from the Inventory Price Matrix Export screen, the initial request was to add a Delete column to the Import spreadsheet, but this makes more sense, because it can be done on the screen without having to Export, update the spreadsheet and then re-import. - Ticket 67715 (29/05/2025 10:12)

The screenshot displays the ProgressPlus.NET software interface. The 'Tools' menu is open, and the 'Inventory Price Matrix' option is selected. The 'Export' tab is active, showing a list of price matrix records. A red box highlights the 'Delete' button at the bottom of the screen. Another red box highlights the 'Export' button in the top right corner. A third red box highlights the 'Delete' button in the bottom right corner of the 'Export' window. A confirmation dialog box is open, asking for confirmation to delete 10 price matrix records.

Export Window Grid Data:

ID	Name	Part No	Part Description	Ra...	Qty	Price	Di...	Disc/Sur...	Notes
C < STANDA...		132	Curved Tiles	Up...	20.00	45.00	0.00	Discount	
C < STANDA...		132	Curved Tiles	Over	20.00	35.00	0.00	Discount	
C COORSTE...	CoorsTek Scotland	132	Curved Tiles	Up...	10.00	35.00	10...	Surcharge	
C COORSTE...	CoorsTek Scotland	132	Curved Tiles	Up...	100.00	25.00	0.00	Discount	
C COORSTE...	CoorsTek Scotland	132	Curved Tiles	Over	0.00	40.00	0.00	Discount	
C DCL	Dynamic Ceramic	132	Curved Tiles	Up...	12.00	25.00	0.00	Discount	
C DCL	Dynamic Ceramic	132	Curved Tiles	Up...	24.00	20.00	0.00	Discount	
C DCL	Dynamic Ceramic	132	Curved Tiles	Over	0.00	25.00	0.00	Discount	
C DCL	Dynamic Ceramic	132	Curved Tiles	Over	20.00	20.00	0.00	Discount	
S ENC001	Enco S.A.	132	Curved Tiles	Over	0.00	100.00	5.00	Surcharge	

Confirmation Dialog:

ProgressPlus.NET

? You are about to delete 10 price matrix records. This cannot be undone.

Are you sure you want to continue?

Yes No

Section – Holidays

Holidays

Holidays - Holiday Planner - Option added to show absences on Holiday Planner

Holidays form: - Checkbox added to show absences – Ticket 61176 (30/08/2024 9:11)

Holidays in November 2024

Year2024

Holiday ScopeEmployee

Holiday DurationFull Day

Holiday Reason

Show Absences

Filter By

JanuaryFebruaryMarchAprilMayJuneJulyAugustSeptemberOctoberNovemberDecember

Name	F1	S2	S3	M4	T5	W6	T7	F8	S9	S10	M11	T12	W13	T14	F15	S16	S17	M18	T19	W20	T21	F22	S23	S24	M25	T26	W27	T28	F29	S30
Gemmell, Ryan																														
Gilchrist, Mike																														
Gilmour, Matthew																														
Hidgenson- External, Alan																														
Hodgson, Hany																														
Imms, Peter																														

Section – Maintenance

Maintenance / Employees

Maintenance - Employees Certification Overview - Added renewal date column

Added Renew Date on Certification setup screen (also amended form to be sizeable -Ticket 62901 (19/09/2024 11:09)

Employee: Harry Hodgson

Details

Picture

Emergency Contact

Responsible

T & A

Skills

Certifications

Notes

Documents

Messages

Transactions

Certifications

Default Category

Load Category

Certification	Validation Date	Renewal Date	Attachment
First Aid	18/11/2024	18/05/2025	
Fire Drill Training	18/11/2024	18/11/2025	
*			

Maintenance

Maintenance - Work Centres - Part status added as a column to Where Used grid

Added Part Status to the Where Used grid on the Work Centre Detail form - Ticket 58827 (13/11/2024 17:06)

Work Centres

New

View

Refresh

Print

Export

Grid Options

Grid Filters

Name :

ID :

Clear

Save

Location :

02/04/2024

AND

02/04/2025

Drag a column header here to group by that column.

ID	Name	Description	Rate Name	Charge Out Rate	Sales Rate	Efficiency	Available	Finite	Non Productive
1	Band Saw	Band Saw	STANDARD	£35.00	£35.00	80.00	31.80	✓	

Work Centre: Band Saw

Details

Where Used

Tooling Required

Skills Required

Capacities

Documents

Messages

Transactions

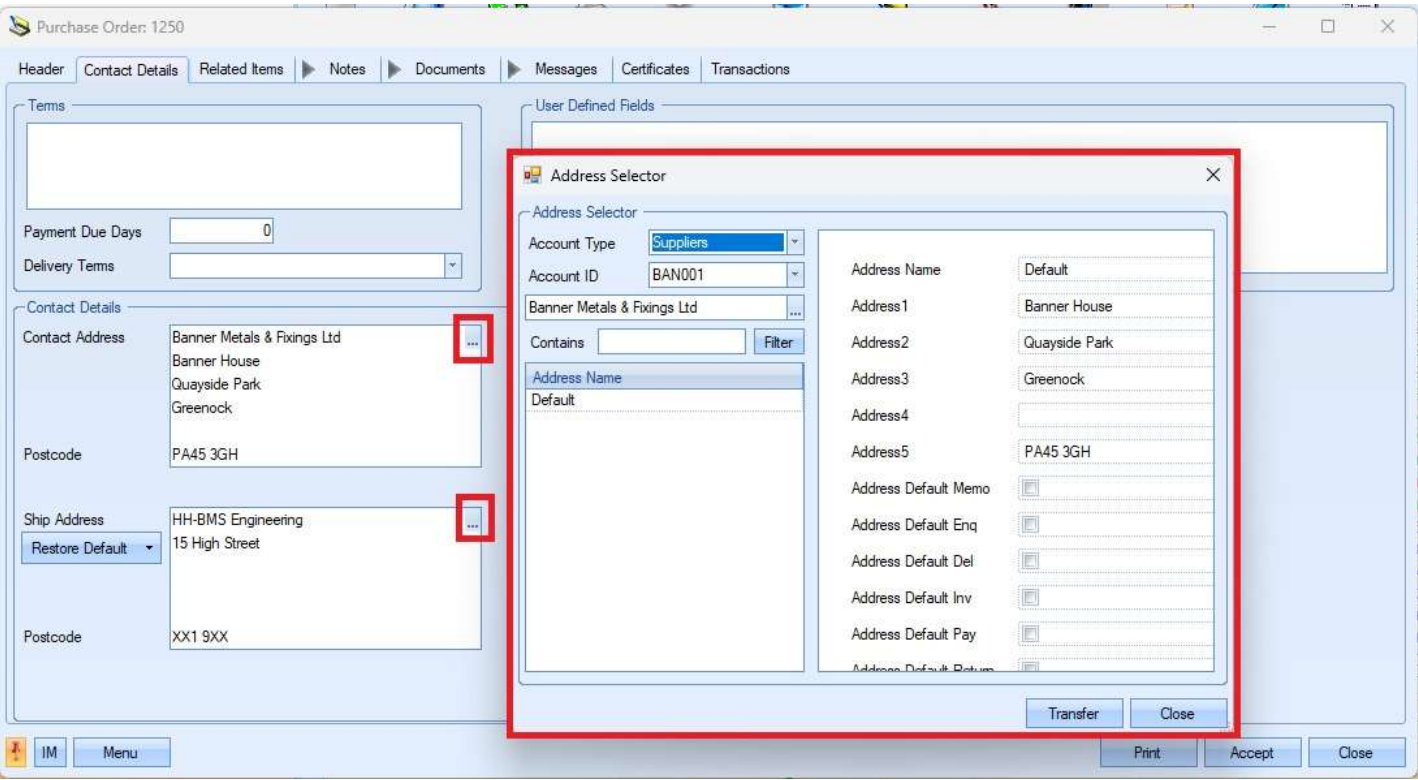
Part No	Part Status	Routing Name	Op No
050302	Live	other	10
050302	Live	STANDARD *	10
060181	Live	STANDARD *	10
06907-P	Live	STANDARD *	10
070015	Live	STANDARD *	10
070021	Live	STANDARD *	10
070033	Live	COST BY WEIGHT OP *	10
070033	Live	STANDARD	10
080456	Live	STANDARD *	10
080458	Live	STANDARD *	10
080462	Live	STANDARD *	10

Section – Miscellaneous

Misc

General - Address Selector - Ability to search customers/suppliers

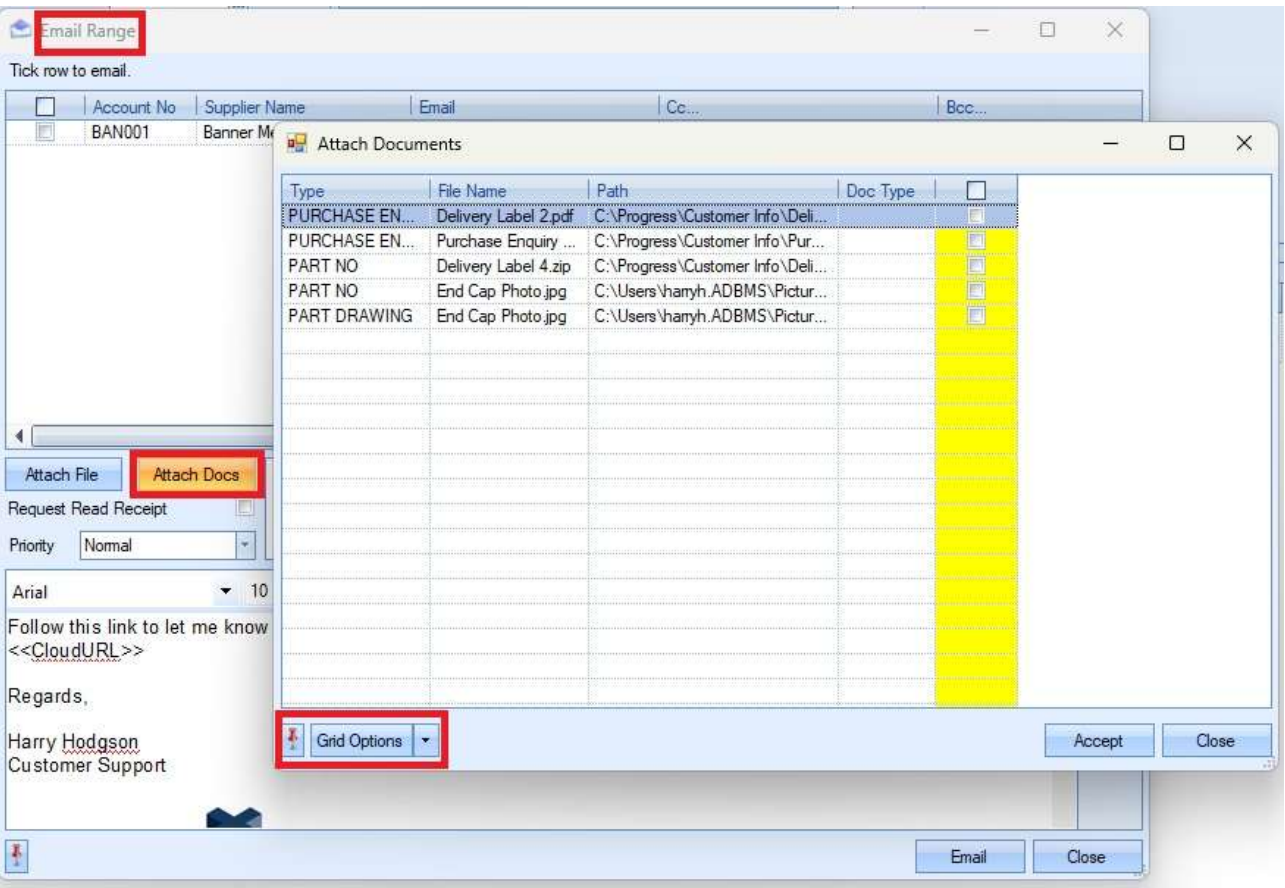
Address Selector :- Added a build button to the Company Name to allow searching by Customer Name - Ticket 65391 (15/11/2024 13:51)



Misc

General - Email – Grid options and ability to pin form added

On the Email->Docs form, added a form pin and grid options - Ticket66492 (07/01/2025 13:37)



Misc

General - Email - Add auto-attach functionality to Email Range options

Added Automatic attachments from System-Options-Email Attachments to the email range form - Ticket 72748

(18/08/2025 15:26)

The screenshot shows the 'Email Range' dialog box. The top toolbar has buttons: New, View, Refresh, Print, Print Range, **Email Range**, PO Shortage, SC Shortage, SC Despatch, Overview, PO Expedite, Export, and Grid. The dialog box has a title bar 'Email Range' and a close button. Below the title bar, there are checkboxes for 'Tick row to email.' and 'Send one email with multiple attachments'. A table lists POs and Suppliers. Below the table, there is an 'Attach File' button and a text field containing the file path: '\\BMS-SRV001\\Training Dept\\Customer Info\\2022-03-31 - Standard Terms T&Cs_condensed.pdf'. Below this, there are checkboxes for 'Request Read Receipt' and a 'Priority' dropdown set to 'Normal'. The bottom section is a text area for the email body, containing the text: 'Please see attached Purchase Order <<DocumentNo>>.', 'Please acknowledge receipt.', and 'Regards Harry Hodgson Customer Support'. The 'Email' and 'Close' buttons are at the bottom right.

PO No	Supplier	Email	Cc...
2049	RS Components UK		
2048	Test Company 2	davidr@progress-plus.co.uk	
2047	Richard Austin Alloys		
2046	Maria Supplier	maria@progress-plus.co.uk	
2045	Maria Supplier	maria@progress-plus.co.uk	
2044	Richard Austin Alloys		
2043	Richard Austin Alloys		
2042	RS Components UK		
2041	Richard Austin Alloys		
2040	Richard Austin Alloys		
2039	RS Components UK		
2038	Richard Austin Alloys		

Attach File: \\BMS-SRV001\\Training Dept\\Customer Info\\2022-03-31 - Standard Terms T&Cs_condensed.pdf

Request Read Receipt: ☐

Priority: Normal

Calibri 11 B / U

Please see attached Purchase Order <<DocumentNo>>.

Please acknowledge receipt.

Regards
Harry Hodgson
Customer Support

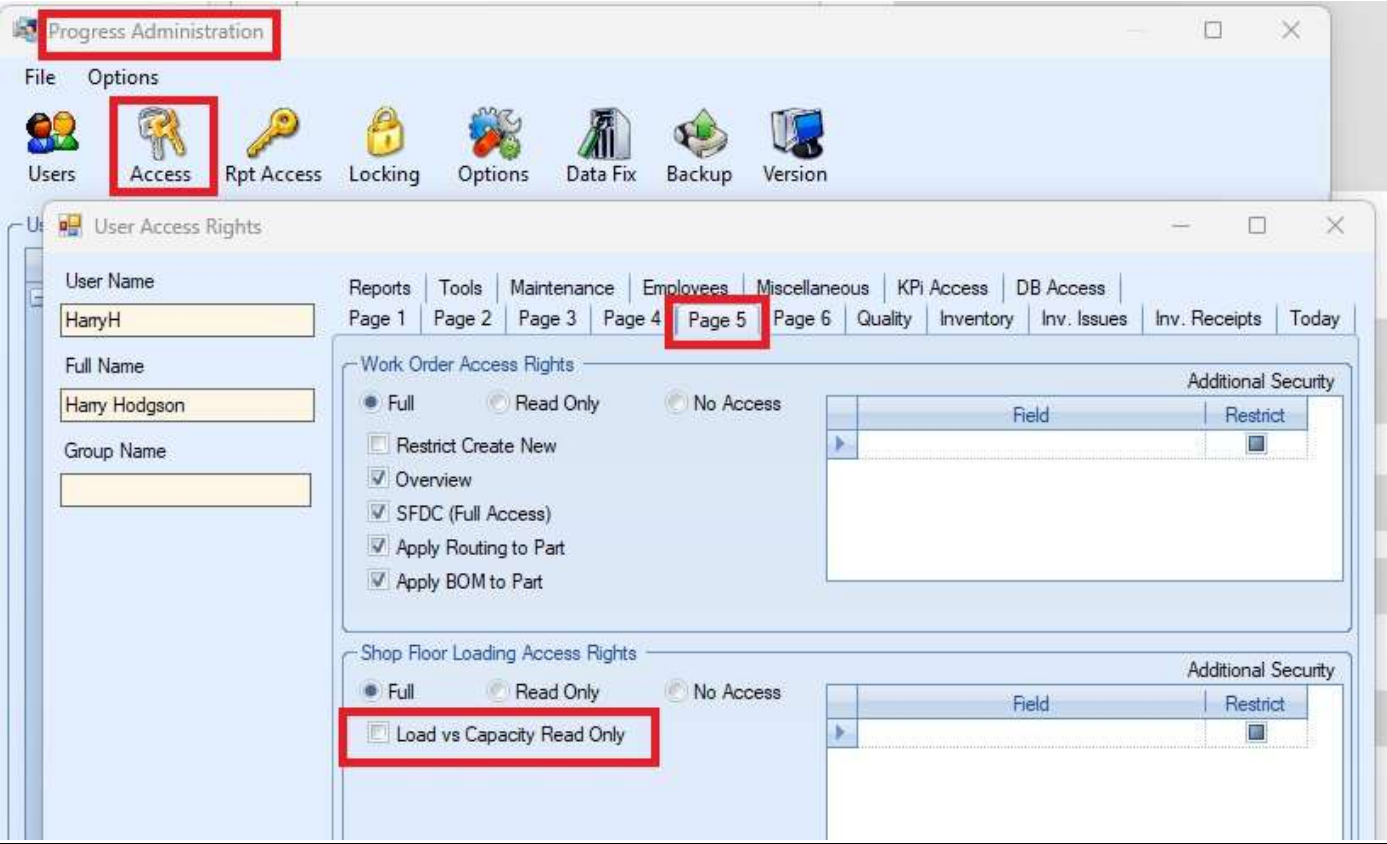
Email Close

Section – Admin

Admin

Admin - Access Rights - Additional user security option added for Load Vs Capacity

Added additional security for Load vs Capacity setting as Read Only - Ticket 58755 (30/07/2024 10:21)



Admin

Admin - Access Rights - Additional user security option added for PO line status

Added user security options for amending PO Line Status on the PO Detail form and amending Complete PO on the PI Match Detail form – Ticket 64029 (31/10/2024 15:25)

The screenshot shows the 'User Access Rights' window, specifically Page 3 of the 'Purchase Order Access Rights' section. The 'Additional Security' table is highlighted, showing the 'Line Status Amend' option with a checkmark in the 'Restrict' column.

Field	Restrict
Line Status Amend	<input checked="" type="checkbox"/>

Admin

Admin - System Options - Control for printing SO documents only on completion of Contract Review expanded to include Production Order

Contract Review: - Production Order Print. Expanded the System Option "Print only when Contract Review is Complete" to include Production Order as well as Sales Order. Print only when Contract Review is complete 'X' SOA 'X' Production Order. (where X are checkboxes) - Ticket 65589 (22/11/2024 15:46)

The screenshot shows the 'Progress System Options' window, specifically the 'Enquiry & SO' tab. The 'Print only when Contract Review is Complete' option is highlighted, showing checkboxes for 'SOA' and 'Production Order'.

Option	SOA	Production Order
Print only when Contract Review is Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Admin

Admin - System Options - Option added to auto-complete a WO when outstanding quantity received

WO Receipt & WO Receipt (Ind Batch) - New System Option (under Stock) to allow completion of the Work Order when receipting the outstanding balance. The Work Order is only completed if it passes the usual checks for options (All Stock Issued, Tools Returned & no one Jobbed On). - Ticket 65863 (12/12/2024 8:39)

The screenshot shows the 'Progress System Options' window with the 'Stock' tab selected. The 'Stock Options' section is expanded, showing 'Allocations' and 'Issues' sub-sections. The 'Allocations' section has four checked options: 'Select Specific Batch for SO Allocations', 'Auto Allocate PO/WO Released Stock', 'Open SO Allocations if PO Receipt has additional balance', and 'Open SO Allocations if WO Receipt has additional balance'. The 'Issues' section has ten options, with the following checked: 'Issue Goods to WO from PO Receipts', 'When Issuing to WO from PO Receipts, set Issue Date to Receipt Date', 'Issue Goods to WO from Adjustment/Free Issue Receipts', 'Issue Goods to Parent WO from WO Receipts', 'Auto Issue Text/Subcon Released Stock', 'Don't Auto Suggest Issue Qty on Production Issue by WO', 'Disable Auto Batch Issue on Production Issue by WO/Booking Ref', 'Show Issue Qty (UOP) Field', 'Allow Production Returns to a different location', and 'Auto Issue Material from Sales Order Requirements'. The 'Future Stock for Structured BOM Tool Options' section has 'Display Future Shortages for' set to 6 Weeks and 'Display BOM Structures to' set to 10 Levels. The 'Calculations based on' section has 'Required Date' selected. The 'Stock Status' section has 'Show Batches in Stock Status' checked. The 'Receipts' section has 'Adjust Stock on to Original GRN for Customer Returns' and 'Warn if PO Received Early by' (set to 1) checked. The 'PO Receipts Due Date based on (instead of Required Date)' section has 'Promised Date' and 'Latest Date' options. The 'Late PO Receipt Reason Required' and 'PO Receipt Requires a Batch No' options are unchecked. The 'Allow Completion of Work Orders when Total Qty Received' option is checked and highlighted with a red box. The 'Accounts Link' tab is also highlighted with a red box. The bottom of the window shows 'All items marked with a * are Company Specific' and 'Accept' and 'Close' buttons.

Progress System Options

SFDC | T & A | Quality | System Numbers | Accounts Link | Email Settings | Printing | Forecasting | Outlook Add-In
Company Details | Costing | Miscellaneous | Inventory | Stock | Enquiry & SO | Work Orders | Delivery & Invoicing | Purchasing | Notes | Labour

Stock Options

Allocations

- ☒ Select Specific Batch for SO Allocations
- ☒ Auto Allocate PO/WO Released Stock
- ☒ Open SO Allocations if PO Receipt has additional balance
- ☒ Open SO Allocations if WO Receipt has additional balance

Issues

- ☒ Issue Goods to WO from PO Receipts
- ☒ When Issuing to WO from PO Receipts, set Issue Date to Receipt Date
- ☒ Issue Goods to WO from Adjustment/Free Issue Receipts
- ☒ Issue Goods to Parent WO from WO Receipts
- ☒ Auto Issue Text/Subcon Released Stock
- ☒ Don't Auto Suggest Issue Qty on Production Issue by WO
- ☐ Disable Auto Batch Issue on Production Issue by WO/Booking Ref
- ☒ Show Issue Qty (UOP) Field
- ☒ Allow Production Returns to a different location
- ☐ Warn if PO specifically raised for WO when issuing material from stock
- ☒ Auto Issue Material from Sales Order Requirements

Future Stock for Structured BOM Tool Options

Display Future Shortages for Weeks

Display BOM Structures to Levels

Calculations based on

☒ Required Date ☐ Promised Date ☐ Latest Date

☒ Exclude MSL from Opening Balance

☐ Exclude Parts with No Movement in Specified Period

☐ Include Forecast WO in Calculations

Stock Status

☒ Show Batches in Stock Status

Receipts

☒ Adjust Stock on to Original GRN for Customer Returns

☒ Warn if PO Received Early by

PO Receipts Due Date based on (instead of Required Date)

☐ Promised Date ☐ Latest Date

☐ Late PO Receipt Reason Required

☐ PO Receipt Requires a Batch No

☒ Allow Completion of Work Orders when Total Qty Received

All items marked with a * are Company Specific

Accept Close

Admin

General - Accounts Link - Link to MS Dynamics 365 application

MS Dynamics 365 API Accounts link - Ticket 69508 (20/05/2025 17:17)

Admin

Admin - Access Rights - New user permissions added for part revisions

Inventory Part Revisions: - Part Revisions now have their own Full, Read Only and No Access setting on the Inventory tab in Access Rights. Initially this will be set to match the Users Inventory setting - Ticket 71035 (01/07/2025 8:55)

The screenshot shows the 'User Access Rights' window for user 'HarryH'. The 'Inventory' tab is selected in the top navigation bar. The 'Inventory Access Rights' section is expanded, showing the following settings:

- Full Access:** ☒ Full, ☐ Read Only, ☐ No Access
- ☐ Restrict Create New
- ☒ Allocations (Full Access)
- ☒ Allocations - Ignore On Order (WO) for SO Line
- ☒ Release Stock
- ☒ Transfers (Full Access)
 - ☒ Transfers (To Quarantine)
 - ☒ Transfers (From Quarantine)
- Additional Security:**
 - ☒ Stock Check
 - ☒ Expired Stock

The 'Part Revision' section is also expanded, showing the following settings:

- Full Access:** ☒ Full, ☐ Read Only, ☐ No Access

The 'BOM & Routing' section is also expanded, showing the following settings:

- BOM:**
 - Full Access:** ☒ Full, ☐ Read Only, ☐ No Access
 - ☒ Lock / Release
- Routing:**
 - Full Access:** ☒ Full, ☐ Read Only, ☐ No Access
 - ☒ Lock / Release

The window includes a 'Menu' button at the bottom left and 'Accept' and 'Close' buttons at the bottom right.