



Berkeley Myles Solutions Ltd.

Progress Plus

Seminar Notes – October 2025

Section – Today

Today

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

★ Favourites - 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 - 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	

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

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	☐
Material Specification	☐

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\Intem...	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 30 Refresh

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	
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 Reveivs by Target Date

Contract Reveivs 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

Day Work Week Week Month 12-May-2025 15-Jun-2025 Today

Monday Tuesday Wednesday

May 12 13 14

SO Due By Latest Date 47

May 12-18

19 20 21

May 19-25

26 27 28

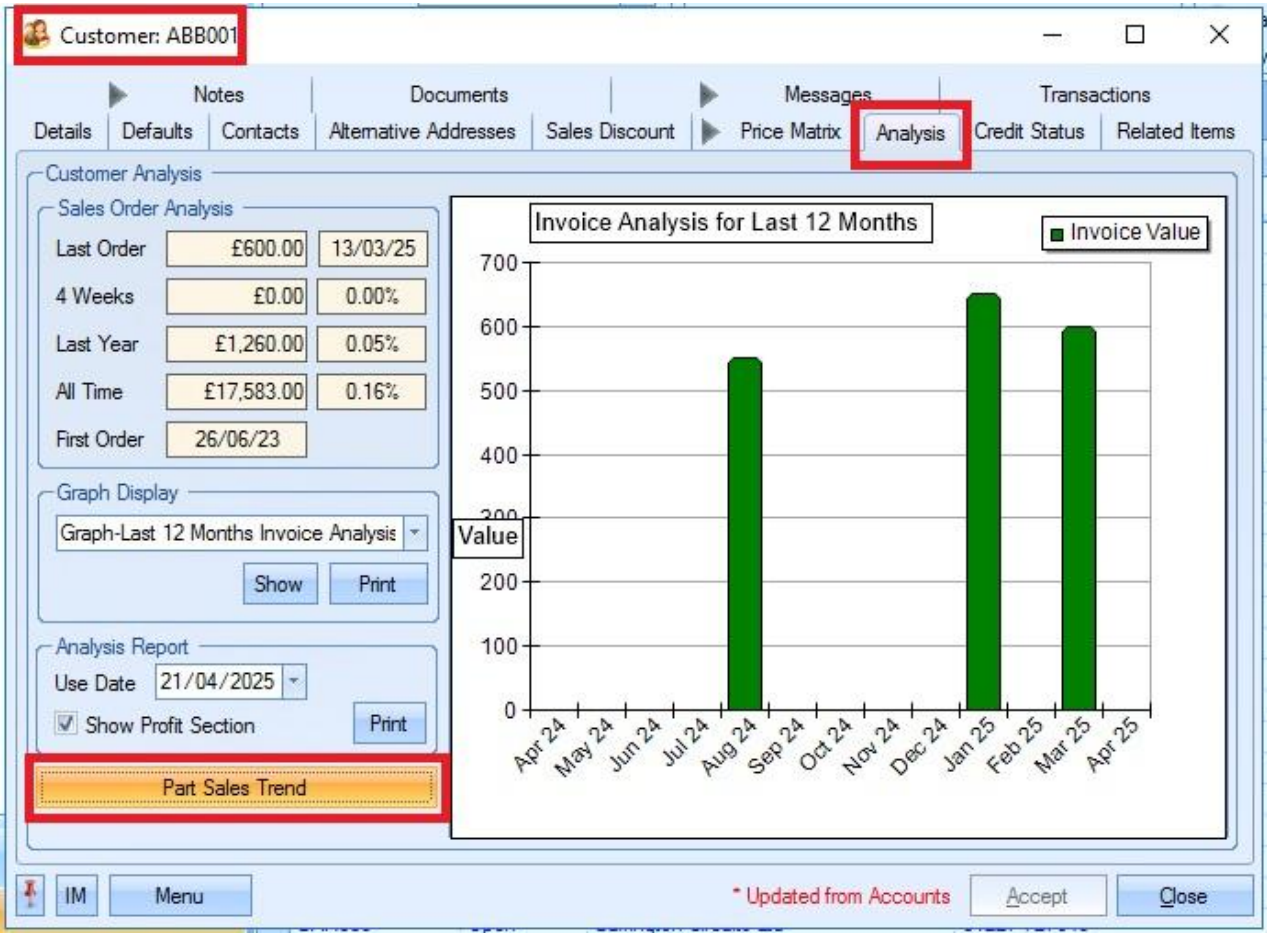
May 26-Jun 01

Section – Customers

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

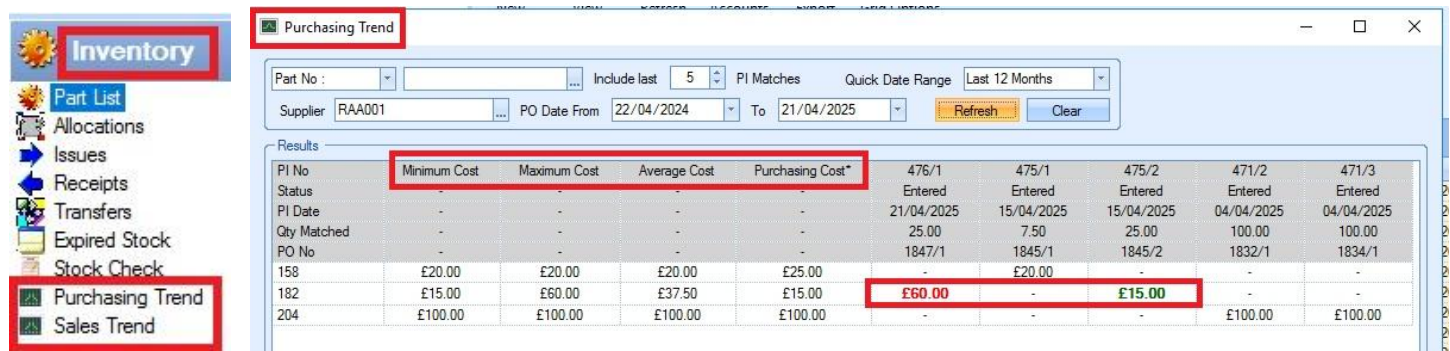
Invoice No	Minimum Price	Maximum Price	Average Price	Selling Price*	1397/1	1366/1	1366/2	1249/1	1081/1	1075/1
Invoice Date					13/03/2025	29/01/2025	29/01/2025	07/08/2024	21/02/2024	14/02/2024
Invoice Qty					10.00	10.00	10.00	10.00	1.00	1.00
SO No					1410/1	1189/1	1231/1	1231/1	1105/1	1003/1
(32961) 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	-	-

Inventory

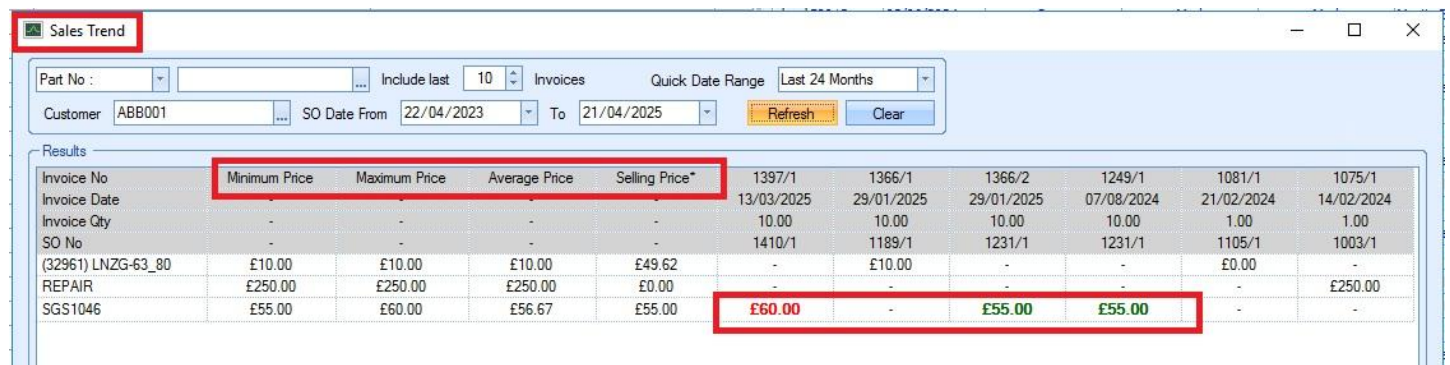
Inventory - Sales Trend - New option added to allow user to see sales history/trends from inventory section

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)



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					£20.00	£20.00	£20.00	£25.00	-	£20.00	-	-	-
182					£15.00	£60.00	£37.50	£15.00	£60.00	-	£15.00	-	-
204					£100.00	£100.00	£100.00	£100.00	-	-	-	£100.00	£100.00

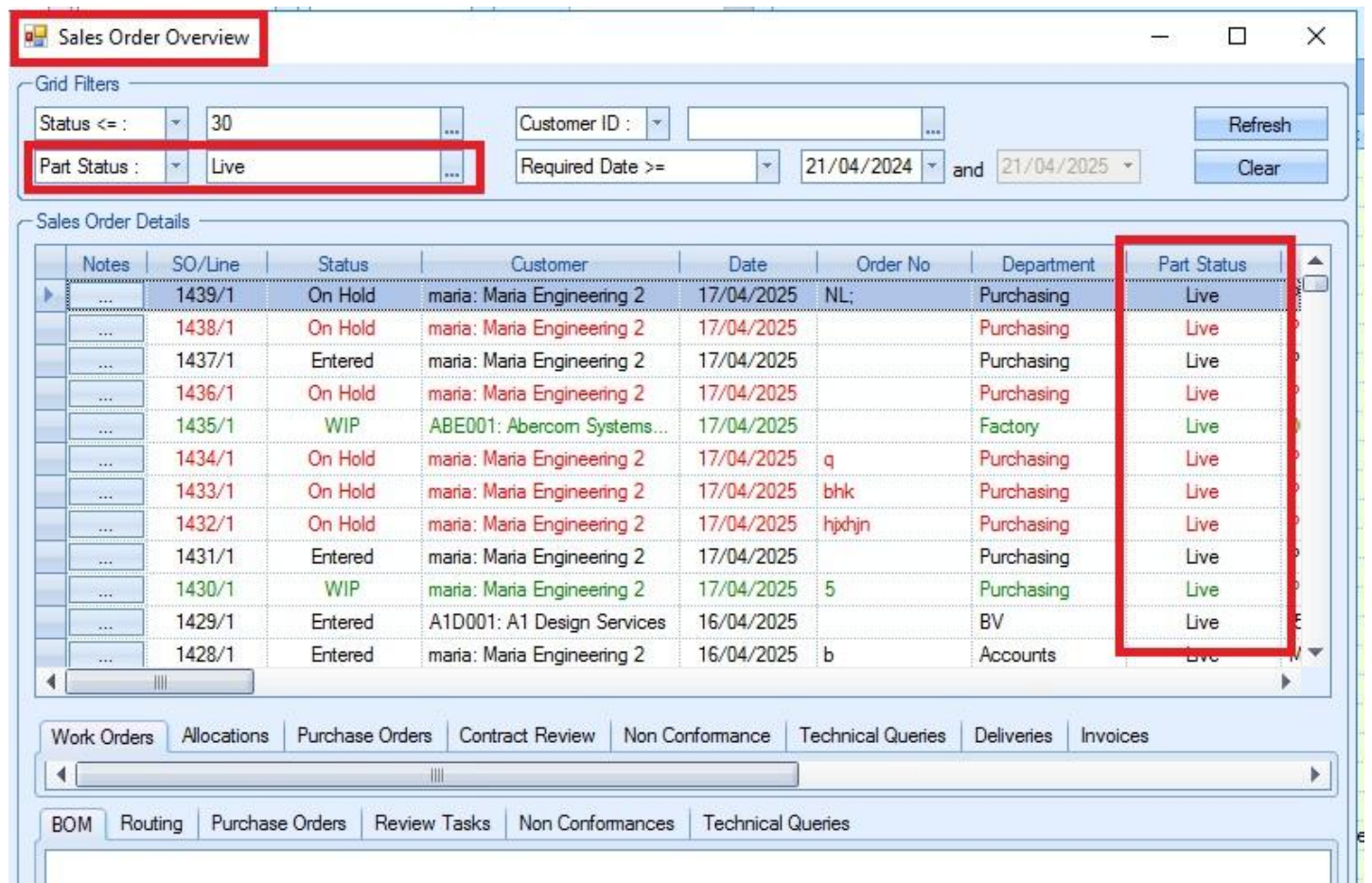


Invoice No	Invoice Date	Invoice Qty	SO No	Minimum Price	Maximum Price	Average Price	Selling Price*	1397/1	1366/1	1366/2	1249/1	1081/1	1075/1
(32961) LN2G-63_80				£10.00	£10.00	£10.00	£49.62	-	£10.00	-	-	£0.00	-
REPAIR				£250.00	£250.00	£250.00	£0.00	-	-	-	-	-	£250.00
SGS1046				£55.00	£60.00	£56.67	£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)



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	hpxhjn	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

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 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	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	Total				
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	125.29
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	120.00

Customers Yes

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)

Sales Order: 1244

Header | Order Details | SO Status | Packing List | Related Items | Notes | Documents | Messages | Transactions

Header Information

Sales Order Number: 1244 Rev. Customer Order No: DCL-565
Sales Order Date: 18/12/2024 Department:
Customer Account: DYN001 Last Reprint No: 1 Contact Name: Full Delivery:
Dynamic-Ceramic Ltd Sales Rep: Harry Hodgson Full Invoice:
Currency/Rate: Sterling 1.0000 Update Submitted: 12/02/2025 POE Required:
Proforma Invoice: Proforma Paid:

Line Details

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

Menu

- Line Details
- View Part
- Copy Order
- Import
- Sales Prices
- Profit
- Cost Overview
- Scheduled Invoices
- Prorata Discount
- Apply To All Lines**
 - 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
 - Set Job Type to All Lines
- Create SO Allocations
- Release SO Allocations
- Create Delivery
- Technical Query

Apply Nominal to All Lines

Enter the nominal to apply to all lines

Accept Cancel

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 11:50:45	FormPrinted	MattG	SalesInvoice: 1333	Invoice No. 1333 Printed	

Section – Suppliers

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)

Purchase Invoice Match: 459

HeaderUpdate CostsRelated ItemsNotesDocumentsMessagesTransactions

Transactions

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: RSComm	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)

Purchase Enquiry: 300

HeaderSupplier FeedbackRelated ItemsNotesDocumentsMessagesTransactions

Supplier Feedback

<SHOW ALL><SHOW ALL>

Drag a column header here to group by that column.

	Additional Cost	Disc./Surcharge	Surcharge	Total Price	Total Last ...	Convert	VAT Rate	Lead Time	Pref Supplier	WONo	Update Price Matrix	Update Purchase Cost	Update Preferred Supplier
0	0.00	10.00		61.25	63.00		0.0000	7	FAR001	0	☒	☒	☒
0	0.00	10.00		68.00	63.00		0.0000	7	FAR001	0	☐	☐	☐
0	0.00	10.00		70.25	63.00		0.0000	14	FAR001	0	☐	☐	☐
0	0.00	0.00		52.50	63.00		20.0000	7	FAR001	0	☐	☐	☐
0	0.00	0.00		77.50	63.00		20.0000	7	FAR001	0	☐	☐	☐
0	0.00	0.00		87.50	63.00		20.0000	14	FAR001	0	☐	☐	☐
0	0.00	0.00		57.00	63.00		20.0000	14	FAR001	0	☐	☐	☐
0	0.00	0.00		67.50	63.00		20.0000	14	FAR001	0	☐	☐	☐
0	0.00	0.00		71.00	63.00		20.0000	7	FAR001	0	☐	☐	☐
0	0.00	0.00		152.50	112.00		0.0000	7	FAR001	0	☐	☐	☐
0	0.00	0.00		120.00	112.00		20.0000	7	FAR001	0	☐	☐	☐
0	0.00	0.00		112.00	112.00		20.0000	7	FAR001	0	☐	☐	☐
0	0.00	5.00		202.00	206.00		0.0000	14	FAR001	0	☐	☐	☐
0	0.00	0.00		220.00	206.00		20.0000	14	FAR001	0	☐	☐	☐
0	0.00	0.00		240.00	206.00		20.0000	7	FAR001	0	☐	☐	☐
				1,659.00	1,521.00								

Grid Options

Min Total Price Per LineMax Total Price Per Line

Price MatrixPurchase CostPreferred Supplier

UpdateConvert

Suppliers

Suppliers - Purchasing - PO Expedite shows overdue POs in red

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
	☐	1231/2	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	24/01/2025	DC6688	Coupling Inserts
	☐	1243/1	☐	Part Received	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
	☐	1244/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
	☐	1245/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
	☐	1246/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	28/02/2025	EC120	End Cap
	☐	1247/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	04/02/2025	EC120	End Cap
	☐	1248/2	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	14/02/2025	EC120	End Cap
	☐	1249/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	19/03/2025	EC120	End Cap
	☐	1250/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	31/03/2025	EC120	End Cap
	☐	1251/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	23/05/2025	EC120	End Cap
	☐	1252/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	23/05/2025	EC120	End Cap
	☐	1253/1	☐	Entered	Banner Metals & Fixin...	Bruce Banner	brucebanner1969@o...	27/06/2025	EC120	End Cap
	☐	1159/1	☐	Entered	Banner Metals & Fixin...	Graham Prentice		22/03/2024	SSRB-303-08-0004	Stainless Steel Round Bar ...
	☐	1156/1	☐	Entered	Banner Metals & Fixin...	Wilson Hamis	wilsonphamis@outloo...	12/07/2024	050323	A/F Meter Mild Steel (Heat ...
	☐	1160/1	☐	Entered	Banner Metals & Fixin...	Wilson Hamis	wilsonphamis@outloo...	05/05/2024	040202	Down Pipe - 80mm Stainles...
	☐	1163/1	☐	Entered	Banner Metals & Fixin...	Wilson Hamis	wilsonphamis@outloo...	07/05/2024	060045	O2 Sensor Boss (For use wi...
	☐	1164/1	☐	Entered	Banner Metals & Fixin...	Wilson Hamis	wilsonphamis@outloo...	28/06/2024	060045	O2 Sensor Boss (For use wi...

Section – Inventory

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)

The screenshot shows the 'Stock Check' application window. At the top, there are 'Grid Filters' for 'Our P/N', 'Group Code', 'Location', and dates '02/04/2025' and '02/04/2025'. A dropdown menu is open, showing options for 'Last Checked' and 'GRN Last Issued' with various comparison operators. The main area is a 'Results' table with columns: GRN No, Line No, Part No, Description, Group, Location, Qty Left, Qty Allocated, and GRN U. The table contains 20 rows of data. At the bottom, there are checkboxes for 'Qty Left > 0' and 'Include Obsolete', a 'Grid Options' dropdown, and a note: '**NOTE: Checked Date on all rows will be updated on Import'. There are also 'Menu', 'Import', and 'Close' buttons.

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	Location	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 - 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	Location	Quarantine RR	
9526/1	00-00173-108	Hoof Valve		3.00	3.00	STORES	0.00	481A		
8843/1	00-00173-108	Hoof Valve	1234	2.00	2.00	STORES	0.00	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 Weight 1.1235

Unit Cost £8.00 Revision B Customer Return Credit

Advice Note 123 Expiry Date 31/07/2026

Notes User Defined Fields

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 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 visible at the bottom of the 'Export' window.

	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	Curved Tiles	Up...	10.00	35.00	10...	Surcharge	
☒	C	COORSTE...	CoorsTek Scotland	Curved Tiles	Up...	100.00	25.00	0.00	Discount	
☒	C	COORSTE...	CoorsTek Scotland	Curved Tiles	Over	0.00	40.00	0.00	Discount	
☒	C	DCL	Dynamic Ceramic	Curved Tiles	Up...	12.00	25.00	0.00	Discount	
☒	C	DCL	Dynamic Ceramic	Curved Tiles	Up...	24.00	20.00	0.00	Discount	
☒	C	DCL	Dynamic Ceramic	Curved Tiles	Over	0.00	25.00	0.00	Discount	
☒	C	DCL	Dynamic Ceramic	Curved Tiles	Over	20.00	20.00	0.00	Discount	
☒	S	ENC001	Enco S.A.	Curved Tiles	Over	0.00	100.00	5.00	Surcharge	

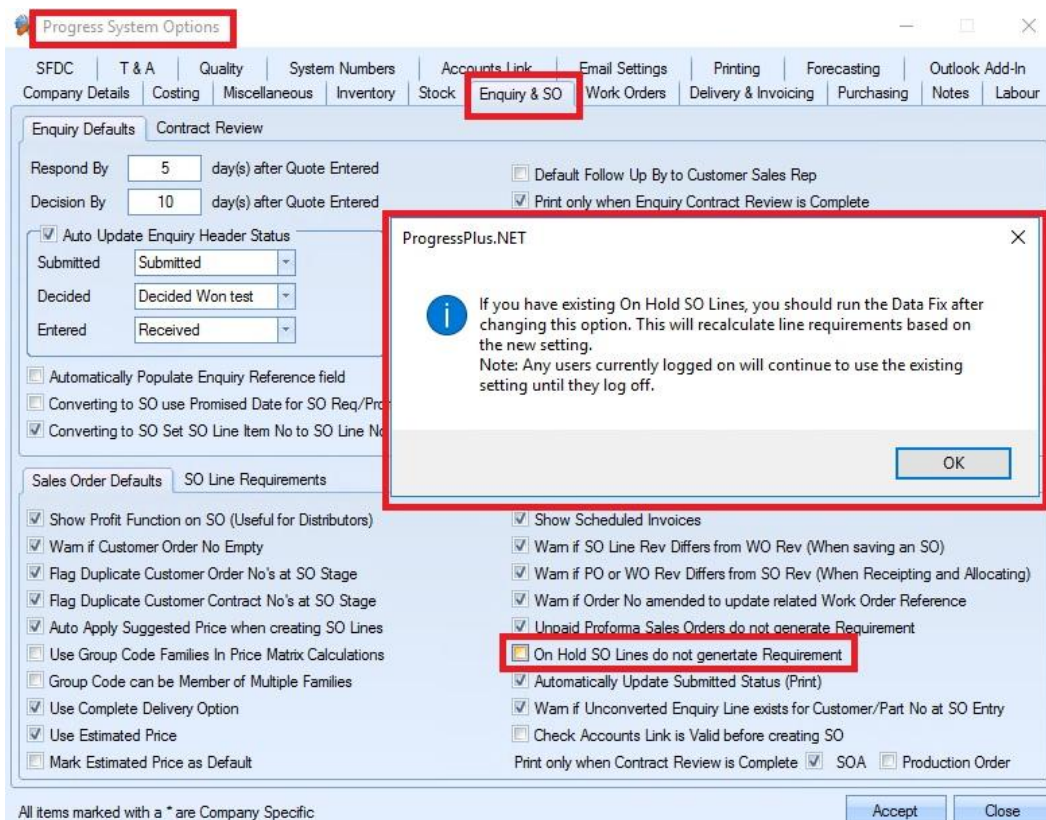
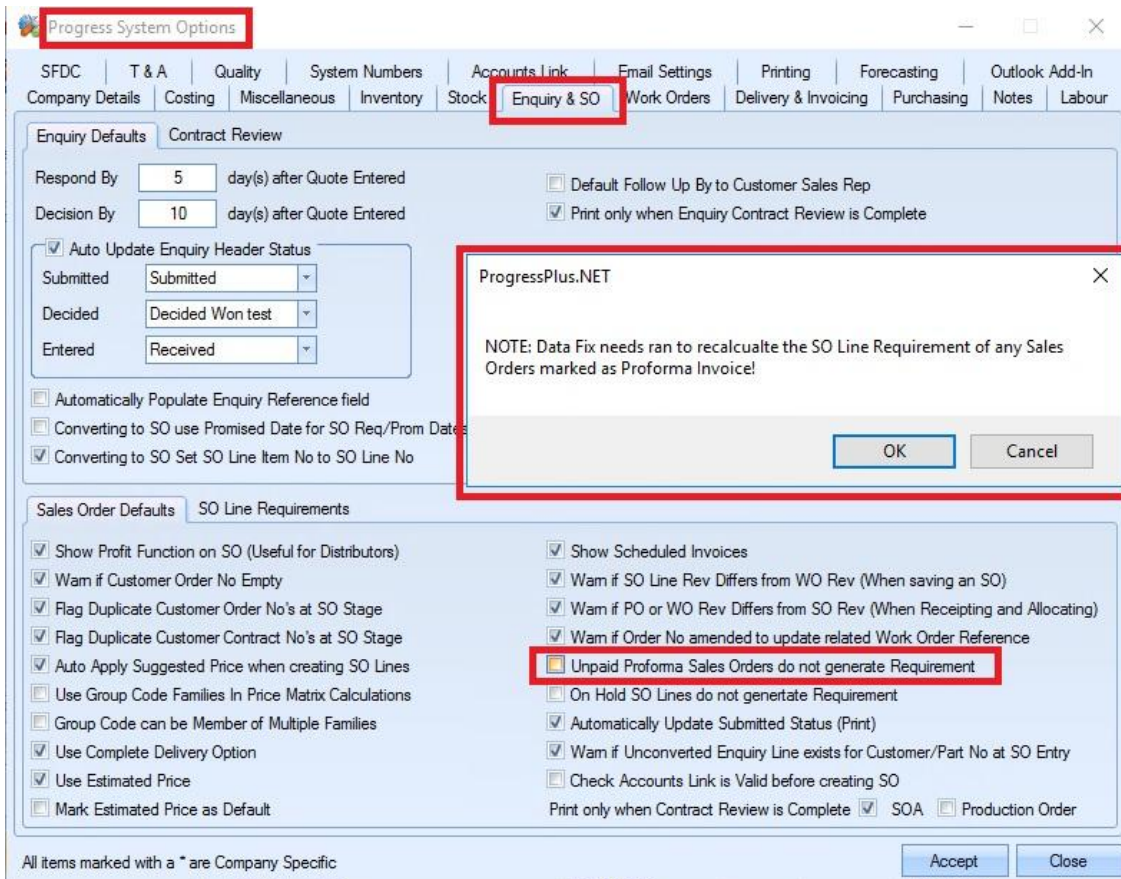
Section – Work Orders

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.



2. If either/both of these options are switched on, then the Stock Status will show and 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 On Hold SO Lines ☒ Exclude Unpaid Proforma SO

☐ Include FI Rec/Req ☐ Include Forecast WO/Req

☐ Exclude Active Stock

Results

Level	Part No	Part Description	Status	Purchased	FI	Active Stock	On Order (WO)
1	(5014094) 418-24...	Socket Contact (SC:6090:A01)	Live	☐	☐	10.00	0.0
2	0.332.209.150	Bosch 12v 30amp Relay xfgbxxgh	Live	☒	☐	38.00	42.0
2	00-00569-200	White VPLC Temperature	Live	☒	☐	911.00	0.0
2	00-00802-600	PMC 600 Module, 24v	Live	☒	☐	0.00	0.0
2	00-00727-240	24v PSV Battery Guard ECU	Live	☒	☐	0.00	0.0
2	00-00853-000	Switch Adapter	Live	☒	☐	0.00	0.0
2	00-00660-121UNP	Unpotted BG2000 ECU 12v , No Auto...	Live	☒	☐	0.00	0.0
1	00-00098-000	TOUHLITE CONTROL	Live	☐	☐	33.147	632.2
2	00-00333-000	Smart Blok Jr	Live	☒	☐	53.00	560.0
2	00-00507-524	24v 200a Relay	Live	☐	☐	6.00	349.2
2	00-00055-006	Relay Assy Bat Grd 24V	Obsolete	☒	☐	718.00	0.0
2	material part		Live	☒	☐	0.00	0.0
1	00-00145-000	7a Latching Controller	Live	☐	☐	2.00	37.0
2	Al FR 6062 0000	Aluminium Flat Bar 6062 3/8" x 1/8"	Live	☐	☐	12.600.00	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

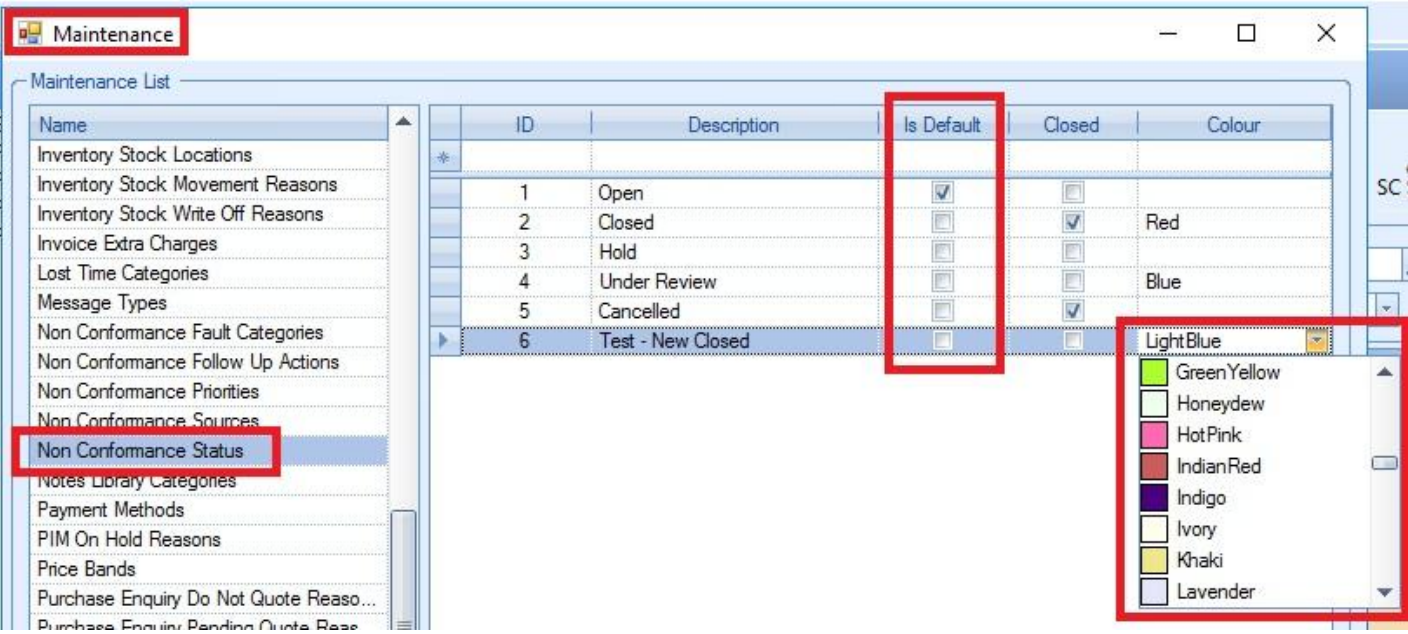
Section – Quality

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

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)



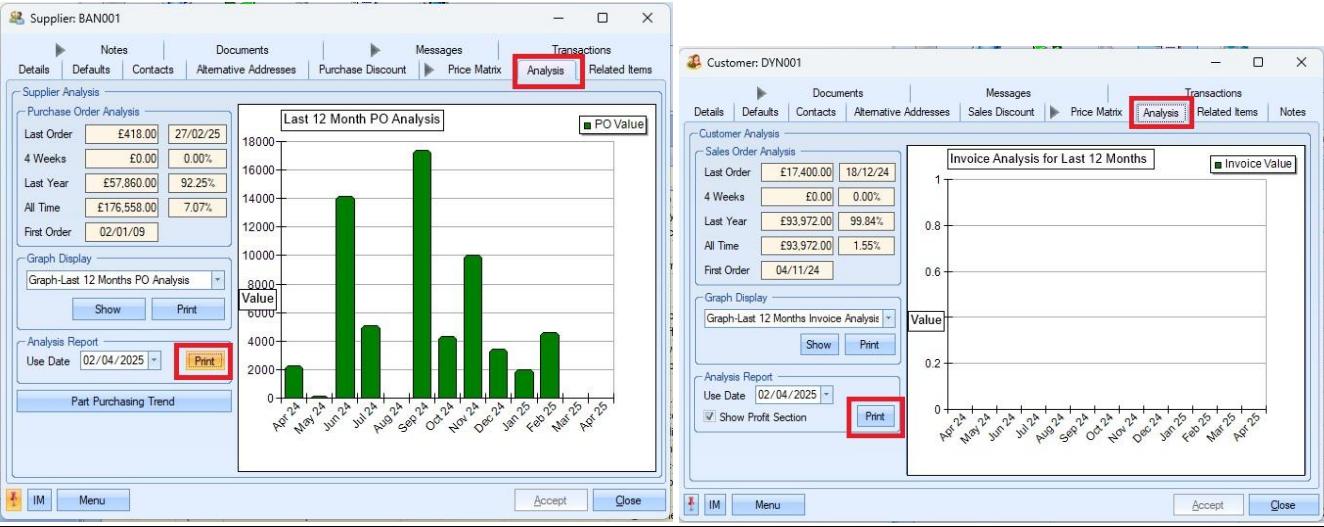
Section – Reports

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)

GRN/Line	Part No: Description	Batch No	Location	Current Qty	UOM	New Qty
3146/9	0892233-3882: LED Circuit Board 50mmx20mm	2350/1	Rack 2	10	each	
3169/20	0892233-3882: LED Circuit Board 50mmx20mm	2403/1	Rack 4	30	each	
3303/1	0892233-3882: LED Circuit Board 50mmx20mm	2523/1	Stores	27	each	
3305/1	0892233-3882: LED Circuit Board 50mmx20mm	2529/1	Stores	11	each	
3169/17	035011: Support Pin 60mm Stainless Steel	2386/1	Stores	1	each	
3185/1	035011: Support Pin 60mm Stainless Steel	2571/1	Stores	1	each	
3286/1	035011: Support Pin 60mm Stainless Steel	2354	Stores	6	each	
3498/1	035011: Support Pin 60mm Stainless Steel	478	Stores	1	each	
3516/1	035011: Support Pin 60mm Stainless Steel	2766/1	Stores	2	each	
3521/1	035011: Support Pin 60mm Stainless Steel	987/1	Stores	159	each	
1742/20	035016: Support Pin 80mm Stainless Steel	1971/1	Stores	6	each	
2817/1	035016: Support Pin 80mm Stainless Steel	2068/1	Stores	4	each	
2847/3	035016: Support Pin 80mm Stainless Steel		Auto Boss Stores	6	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 - Tooling & Equipment Issue report - Added filter for Issued To employee

Added Issued To as filter on Tooling/Equipment issues report – Ticket 68362 (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			☐	
					26/02/25 12:19	Maria Pearson	26/02/25 12:21	MariaP	☐	

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 - 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

Suppliers

Reports

Print

100%

1/1

Tooling/Equipment Issues

Report Options

Options

Required Data

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%

Tooling/Equipment Issues

Report Options

Options

Quick Date Range Last 12 Months

Required Data

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		
Sort By	Descending	

Options View Close

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

Reports

Reports - 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)

Reports

Quick Search

- Favourites
- Deliveries
- Enquiries
- Inventory
- Invoicing
- Labour
- Misc
 - Correspondence
 - Customer Activity
 - Customer Analysis
 - Customer Analysis (All)
 - Customer Summary
 - Employee Certification
 - Employee Certification (Active)**
 - Employee Skills
 - Employee Summary
 - Financial Summary Report
 - Identity Label
 - Lost Time Categories
 - Supplier Activity
 - Supplier Analysis
 - Supplier Analysis (All)
 - Supplier Quality Summary
 - Supplier Summary
- PI Matching
- Projects
- Purchasing
- Quality
- Sales Orders
- Works Orders

Today

Customers

Reports

Print 100%

Employee Certification (Active)

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

---- End Of Report ----

Section – SFDC

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

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

Previous

Holiday Request

Hours Worked

Work To List

Work To List By Department

Extra

Main Menu

SINGLE JOB MODE

Employee: Gary Anderson

Clocked in: 16/04/2025 12:07

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) LNKG-63_80	TRUNNION SUPPORT (S...		0:00
52248/10	(32961) LNKG-63_80	TRUNNION SUPPORT (S...		0:00
52250/99	(1383372) DSBC-80-160-PPSA-N3	CYLINDER		1:00
52251/10	(32961) LNKG-63_80	TRUNNION SUPPORT (S...		0:00
52260/10	(32961) LNKG-63_80	TRUNNION SUPPORT (S...		0:00
52266/10	(32961) LNKG-63_80	TRUNNION SUPPORT (S...		0:00
52263/10	(32961) LNKG-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

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

SINGLE JOB MODE

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)

Progress System Options

SFDC

Company Details | Costing | Miscellaneous | Inventory | Stock | Enquiry & SO | Work Orders | Delivery & Invoicing | Purchasing | Notes | Labour

T & A | Quality | System Numbers | Accounts Link | Email Settings | Printing | Forecasting | Outlook Add-In

Shop Floor Data Collection

SFDC Options | * Labour Questions | * Labour Buttons | * Material Options

Button	Order	Show Activity	Security Level
Clock	1	☒	45
Activity	2	☒	0
Break	3	☒	0
On/Off Site	4	☒	0
Fire List	5	☒	
SFDC Material	6	☒	
Job On	1	☒	
PO Image	3	☒	
GRN Image	3	☒	
Delivery Image	3	☒	
Op Notes	5	☒	
Instruction Notes	6	☒	
Feedback Notes	7	☒	
Innovation Notes	8	☒	

ProgressPlus.NET

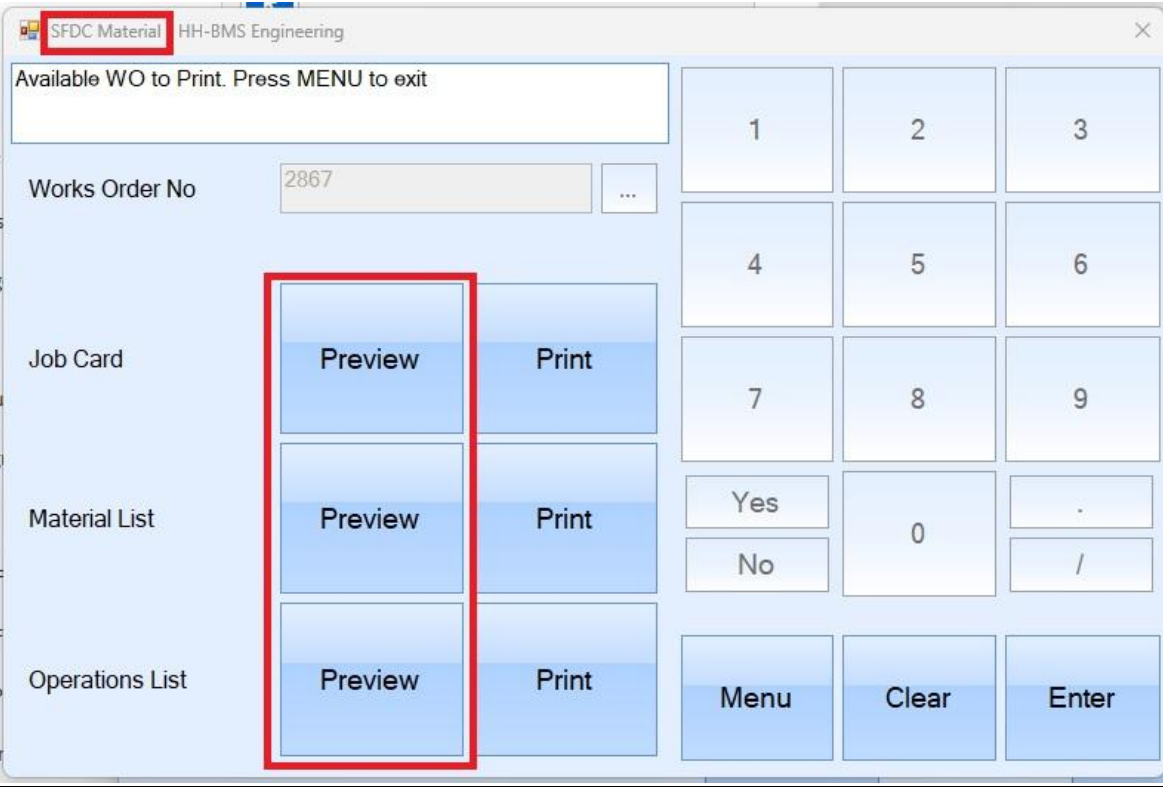
Security Level can only be edited on an Activity On/Off buttons, not the Initial screen buttons. (i.e. Job On/Off, Booking Ref, Notes etc.)

OK

Section – SFDC Material

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

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)



Section – Tools

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

Sector

Delivery Terms

Family Name

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 'Export' option is selected. The 'Inventory Price Matrix' is highlighted in the left-hand navigation pane. The main window shows the 'Export' screen with a table of price matrix records. A red box highlights the 'Delete' button at the bottom of the table. Another red box highlights the 'Delete' button in the bottom right corner of the window. A confirmation dialog box is open, asking for confirmation to delete 10 price matrix records.

Export Screen 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 – Maintenance

Maintenance

Project Cost Overview Screen and Reports:

- filter out cancelled PO Lines
- take discount into consideration on POs
- filter options to include/exclude all the various cost types
- option to Apply a date range filter, if desired - Ticket 71036 (30/06/2025 23:00)

Project/SO Cost Overview

Project

Sales Order

Demo Project

Refresh

Clear

Project Demo Project Details

Description

Demo Project Data

Manager

Paul Sikes

Status

(1) Live

Filter Options - Include:

☒ Material Issued

☒ Material Allocated to SO

☒ Material Rec'd Not Issued

☒ Subcon Issued

☒ Material PO O/S

☒ Subcon PO O/S

☒ Material Delivered

☒ Labour

Date Filter

01/09/2025

to

30/09/2025

Reset

Save

Summary

Cost Group	Total Cost
MATERIAL	
Alu	£60.33
Electronic	£950.00
Sales	£6.02
Sales - Distribute	£2,456.59
SS	£1,640.38
TOTAL MATERIAL	£5,113.32
SUBCON	
Chrome	£2,400.00
TOTAL SUBCON	£2,400.00
LABOUR	
5 Axis M/Cntr	£19.91
Band Saw	£1,050.03
CNC Mill	£140.00
Manual Lathe	£280.00
Manual Ops	£152.50
TOTAL LABOUR	£1,642.44
PROJECT TOTAL	£9,155.76

Print

Details

Group Code / S...	SO	WO	Date	Cost Type	Detail	PO	GRN	Batch No	Qty / Time (Hrs)	Unit Cost / ...	Total Cost
MATERIAL											
Alu	1006/1	1977	04/05...	Issued	ALFB-6063-0001: Alumi...	847/6	270...		4,000.00	£0.01	£23.32
Alu	1006/2	1978	04/05...	Issued	ALFB-6063-0001: Alumi...	847/7	270...		3,400.00	£0.01	£19.82
Alu	1006/3	1979	04/05...	Issued	ALFB-6063-0001: Alumi...	847/8	270...		2,800.00	£0.01	£16.32
Alu	1016/1	2001	07/08...	Issued	ALFB-6063-0004: Alumi...	693/1	222...	13186	480.00	£0.00	£0.86
Electronic			13/08...	O/S PO	EC120	125...			10.00	£15.00	£150.00
Electronic			13/08...	O/S PO	EC120	125...			10.00	£20.00	£200.00
Electronic			25/08...	Recd Not...	EC120	125...	360...		25.00	£20.00	£500.00
Electronic			25/08...	Recd Not...	EC120	125...	360...		5.00	£20.00	£100.00
Sales	1005/4	2103	07/05...	Delivered	5353231: Chrome Plate...	285...	2103/1		25.00	£0.24	£6.02
Sales	1240/1	2836	06/06...	Delivered	ACT40V: This equipme...	352...	2836/1		1.00	£0.00	£0.00
Sales - Distribute	1139/1		12/05...	Delivered	M42-50-12L: M42 Long...	479/1	173...	BTCH0...	140.00	£2.53	£353.72
Sales - Distribute	1139/3		12/05...	Delivered	M50-40-12L: M50 Long...	514/2	173...	BTCH0...	40.00	£2.40	£96.00
Sales - Distribute	1156/4		11/01...	Delivered	M42-40-14S: M42 Shor...	102...	324...		200.00	£2.01	£401.38
Sales - Distribute	1156/4		11/01...	Delivered	M42-40-14S: M42 Shor...	102...	324...		200.00	£2.01	£401.38
Sales - Distribute	1156/4		11/01...	Delivered	M42-40-14S: M42 Shor...	102...	324...		200.00	£2.01	£401.38
Sales - Distribute	1156/4		11/01...	Delivered	M42-40-14S: M42 Shor...	102...	324...		200.00	£2.01	£401.38
Sales - Distribute	1156/4		11/01...	Delivered	M42-40-14S: M42 Shor...	102...	324...		200.00	£2.01	£401.38
PROJECT TOTAL											£9,155.76

Close

Project Cost Overview Summary

Project: Demo Project

Included: Material Issued, Material Rec'd Not Issued, Material PO O/S, Material Delivered, Material Allocated, Subcon Issued, Subcon PO O/S, Labour. No Date Range Applied.

Project:	Demo Project : Demo Project Data		
Status:	Live	Manager:	Paul Sikes
Cost Category	Group Code	Cost	
Material	Alu	60.33	
	Electronic	950.00	
	Sales	6.02	
	Sales - Distribute	2,456.59	
	SS	1,640.38	
	Material Total	5,113.32	
Cost Category	Subcon Code	Cost	
Subcon	Chrome	2,400.00	
	Subcon Total	2,400.00	
Cost Category	Work Centre	Cost	
Labour	5 Axis M/Cntr	19.91	
	Band Saw	1,050.03	
	CNC Mill	140.00	
	Manual Lathe	280.00	
	Manual Ops	152.50	
	Labour Total	1,642.44	
Project Total		9,155.76	

Project Cost Overview Details

Project: Demo Project

Included: Material Issued, Material Rec'd Not Issued, Material PO O/S, Material Delivered, Material Allocated, Subcon Issued, Subcon PO O/S, Labour. No Date Range Applied.

Project:		Demo Project : Demo Project Data								
Status:		Live	Manager:		Paul Sikes					
Material										
Group Code	Date	Cost Type	Part No	SO	WO	PO	GRN	Quantity	Unit Cost	Total Cost
Alu	04/05/20	Issued	ALFB-6063-0001: Aluminium Flat Bar 6063 3/8" x 1/8" (9.5mm x 3.2mm) x 1m Long	1006/1	1977	847/6	2700/6	4,000.00	0.01	23.32
Alu	04/05/20	Issued	ALFB-6063-0001: Aluminium Flat Bar 6063 3/8" x 1/8" (9.5mm x 3.2mm) x 1m Long	1006/2	1978	847/7	2700/7	3,400.00	0.01	19.82
Alu	04/05/20	Issued	ALFB-6063-0001: Aluminium Flat Bar 6063 3/8" x 1/8" (9.5mm x 3.2mm) x 1m Long	1006/3	1979	847/8	2700/8	2,800.00	0.01	16.32
Alu	07/08/20	Issued	ALFB-6063-0004: Aluminium Flat Bar 6063 3/8" x 1/8" (9.5mm x 3.2mm) x 4m Long	1016/1	2001	693/1	2228/1	480.00	0.00	0.86

Section – Admin

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' dialog box. The 'Enquiry & SO' tab is selected in the top menu. The 'Contract Review' sub-tab is active. In the 'Contract Review' section, the checkbox 'Print only when Contract Review is Complete' is checked. Below this, the checkboxes for 'SOA' and 'Production Order' are also checked. The 'Enquiry Defaults' section contains several other options, some of which are marked with an asterisk (*). The 'Sales Order Defaults' and 'SO Line Requirements' sections are also visible. At the bottom, there are '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

Enquiry Defaults | **Contract Review**

☐ Show Enquiry Contract Review when Enquiry Accepted
☐ Show Contract Review when Sales Order Accepted
☒ Automatically add default Tasks to new Contract Reviews
☐ When entering a Task, force Assigned To/Department to be populated
☒ Parallel Tasks
☒ Previous Dependent Tasks Must be Completed first

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

Print only when Contract Review is Complete ☒ SOA ☒ Production Order

All items marked with a * are Company Specific

Accept Close

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 window has a title bar and a menu bar with 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, and Labour. The 'Stock' tab is highlighted with a red box. The main area is divided into several sections: 'Stock Options' (with sub-sections 'Allocations' and 'Issues'), 'Future Stock for Structured BOM Tool Options', 'Calculations based on', 'Stock Status', and 'Receipts'. The 'Allocations' section has four checked options. The 'Issues' section has ten options, with the last one 'Auto Issue Material from Sales Order Requirements' checked. The 'Future Stock for Structured BOM Tool Options' section has two dropdowns: 'Display Future Shortages for' set to 6 Weeks and 'Display BOM Structures to' set to 10 Levels. The 'Calculations based on' section has three radio buttons: 'Required Date' (selected), 'Promised Date', and 'Latest Date'. The 'Stock Status' section has one checked option: 'Show Batches in Stock Status'. The 'Receipts' section has four options: 'Adjust Stock on to Original GRN for Customer Returns' (checked), 'Warn if PO Received Early by' (set to 1), 'PO Receipts Due Date based on (instead of Required Date)' (with 'Promised Date' and 'Latest Date' radio buttons), and 'Allow Completion of Work Orders when Total Qty Received' (checked and highlighted with a red box). At the bottom, there is a footer that says 'All items marked with a * are Company Specific' and two buttons: 'Accept' and '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

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

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' dialog box for user 'HarryH'. The 'Inventory' tab is selected in the top navigation bar. The 'Inventory Access Rights' section has 'Full' access selected. The 'Part Revision' section, highlighted with a red box, also has 'Full' access selected. The 'BOM & Routing' section has 'Full' access selected for both BOM and Routing. The 'Additional Security' section has 'Stock Check' and 'Expired Stock' checked. The 'Menu' button is at the bottom left, and 'Accept' and 'Close' buttons are at the bottom right.

User Name: HarryH
Full Name: Harry Hodgson
Group Name:

Reports | Tools | Maintenance | Employees | Miscellaneous | KPi Access | DB Access | **Inventory** | Inv. Issues | Inv. Receipts | Today

Page 1 | Page 2 | Page 3 | Page 4 | Page 5 | Page 6 | Quality | **Inventory** | Inv. Issues | Inv. Receipts | Today

Inventory Access Rights

☒ 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

Field	Restrict
	☒

☒ Stock Check
☒ Expired Stock

Part Revision

☒ Full ☐ Read Only ☐ No Access

BOM & Routing

BOM

☒ Full ☐ Read Only ☐ No Access
☒ Lock / Release

Routing

☒ Full ☐ Read Only ☐ No Access
☒ Lock / Release

Menu Accept Close