Manor Monumental Database
User Guide

Table of Contents

Main Form

This is the first form that appears when starting the database program, from here the default settings, orders and reports are created and edited. It also provides access to additional tools to simplify and enhance how you process orders and maintain a smooth running of the business.

Main Form Areas

The Main Form is split into three key areas:

- Tasks Bar
- Order Grid
- Button Bar

The Tasks Bar

Gives access to the Forms and Dialogs that allow the creation and editing of default values as well as sales order processing, for more details see 'Task Bar' on page 2.

Order Grid

This area of the form allows access to all the jobs/orders in the sales database, by hovering over some order fields extra information will be displayed, for more information see 'Order Grid' on page 18.

Main Form Button Bar

The Button Bar on this form gives you access to every day tools so New Orders and Searches and can be quickly achieved without going through the Tasks Bars' menu system, for more information see 'Main Form Button Bar' on page 19.

Information Areas

There are also two information areas

- Form caption
- Form summary

Form caption
At the top of the form that shows Company, version and workstation information

Form summary
At the bottom of the form, as the mouse is moved around the order grid additional information is displayed here

Tasks Bar
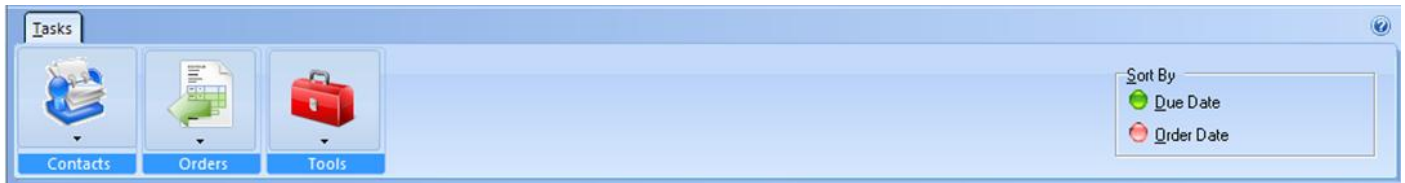
There are three task groups:

- ➢ Contacts
- ➢ Orders
- ➢ Tools

Each group has a menu on it that allows you to access the features of that task; some of the features can also be accessed from the Order grid below this task bar as well as from other forms within the program, for example you can edit and create customer contact information on the order form without the need to close the form and go to the Contacts task button.

Contacts

 This is used to manage repeat clients and supplier contact information

Clicking anywhere on the contacts task will cause the contacts menu to drop down and reveal the Contacts top level menu which comprises of New & Open, each of these has a sub menu for handling Customers and Suppliers

New
This is the sub menu item of the contact menu allows access to the New client and New Supplier forms via the New Client and New Supplier sub menu items.

New Client
Use the sub menus from here to create a new repeat client.

> **New Client Tip**
> A New client can also be created from an existing order by using the Add button in the client details area of the order

New Supplier
Use the sub menus from here to create a new supplier

Open
This is the sub menu item of the contact menu allows access to the Open client and Open Supplier forms via the Open Client and Open Supplier sub menu items allowing stored information to be viewed or updated.

Open Client
Use the sub menus from here to view or edit a repeat client

Open Supplier
Use the sub menus from here to view or edit a supplier

Orders

 This is used to create new and manage existing orders

Clicking anywhere on the orders task will cause the orders menu to drop down and reveal the top level menu which comprises of New order for new client, New order for existing client, Open and Open By

New Order for New Client
Use this to create a new order for a 'one off' client, clicking it is the same as clicking the 'New Order' button (see page 6).

New Order for Existing Client
Use this to create a new order for a repeat client

Open
Open the currently highlighted order

Open Order Tip
As the grid tries to sense mouse movements to dynamically keep up with user actions it is often easier to double click the order you want to view or edit rather than use the 'open' option

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Open by

Tools

This is used to access the tools task

Many of the programs default actions, prices and visual options are configured through the tools task. This task also gives access to the 'back office' tools for account management and 'ad-hoc' report generating

- ➢ Account Management
    - o Unpaid
    - o Paid (Still Active)
    - o Past Due (Still Active)
- ➢ Locations
- ➢ Custom Stones & Extras
- ➢ Catalogue Manager
- ➢ Designs
- ➢ Utilities
    - o Custom Reports
    - o SQL Builder
    - o Backup
- ➢ Change Defaults
    - o Vat Rate
    - o No of free letters
    - o Lettering Price
    - o Photo Tiles
    - o Job Screen Colours
    - o Kerbs & Tubs
- ➢ About

Account Management

These forms are used to ease the management orders that have:

➢ An Unpaid balance or have not been marked as paid in full
➢ Been paid but are still active
➢ Are showing as past due

See page 8 for details on using the Complete, Search, Payments and Statement buttons

Unpaid

Usage

Use this form to see the Invoices that have not been marked as paid in full.

Paid (Still Active)
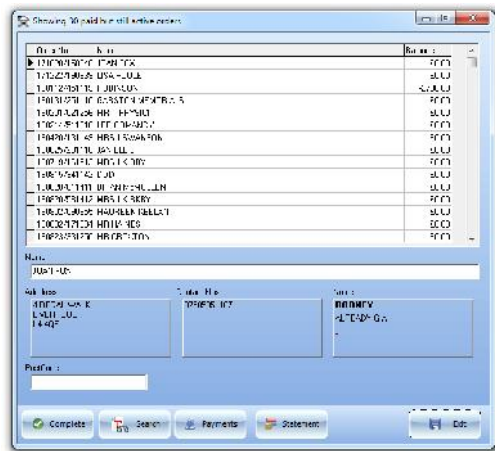
Usage

Use this form to see Orders that are fully or over paid and, where required mark them as complete. The Form Title shows how many orders are paid in full (i.e. have a less than 0.01p balance.

Past Due (Still Active)

Usage

Use this form to see Orders that are fully or over paid and, where required mark them as complete. The Form Title shows how many orders are past due (i.e. have a due date less than the current system date).

Accounts management forms general layout

The tile bar of these forms displays the number of records found followed type of information being displayed in the grid i.e.:

- ➢ Unpaid
- ➢ Paid But still active
- ➢ Past Due but still active

The grid shows the order number, name on the order and balance due, below the grid are the contact details and order notes for the highlighted order. Below the information area are the control buttons.

To View/Edit the order

To view or edit an order; double click on the order in the grid area, this will open the order form (the order can also be marked as complete when closing the order form).

Account Management Control Buttons

Complete Button

To mark the order as complete highlight the order to be completed in the grid and click the 'Complete' button.

Note
If you are viewing 'Unpaid' invoices the order will also be marked as 'Paid In Full' even if there is a none zero balance,

Search Button

To search for an order left click the 'Search' Button, this opens the search dialogue:
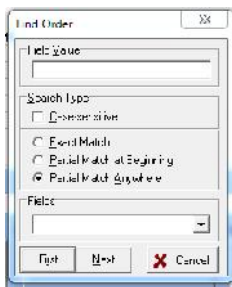
Type the value to search for in the 'Field Value' box.

By default the field searched is the 'Name' field but most other fields can also be searched by selecting the relevant field name from the 'Fields' drop down box.

Payments Button

To Apply/Edit payments on an order highlight the order, or search for, the order and click the Payments Button.
This opens the Payments form, which is the same as that found from the order form (see page 35).

Statement Button

Statements can only be printed if at least one payment has been received.

Locations

Add, remove or edit the locations where memorials will be placed and any applicable costs:

The available locations can be browsed by using the 'Locations' Dropdown box or by using the vertical scroll bar on the right of the grid.

Designs
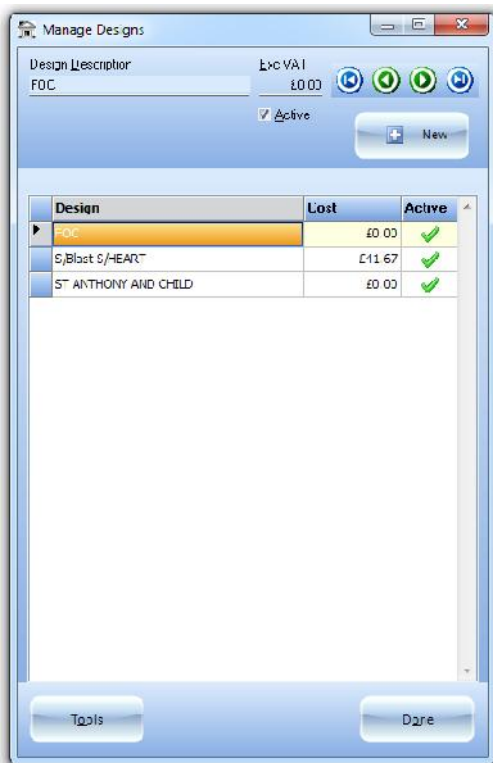
Use this to manage the stored stone 'Designs', clicking it opens the designs dialog.

New Design Button
Click this to create a new design, once clicked the 'New Design Dialog' opens:

Enter a description and Exc. Vat Price for the new design

To change the price on an existing design either use the design navigator in the top right or click on the design in the design grid then click the Exc. Vat price and type the new price.

Making a design unavailable for orders

To make a design unavailable for new orders remove the tick from the 'Active' check box, to make the design available again put the tick back

Once the designs are added/edited click the Done button to close the 'Designs Dialog' and return to the Main Form

Custom Stones & Extras

This form allows the management of stone stock and accessories

Stone Groups Button

Click to open the Stone Group Create/Edit Form:

This form is used to Create, Delete or Replace the available stone groups.

Add Button
Click to Add a new stone group description

Delete Button
Click to remove the highlighted stone group description

Replace Button
Click to replace the highlighted stone group description with a new one

Exit Button
Click to close the 'Stone Group Create/Edit Form' and return to the 'Custom Stones & Extras' form

New Stone Button

Opens the 'Stock Card' form to create a new Stone item along with its pricing information, stock level and re-order level:

Stone Grid

Shows and allows quick access to each stones stock card to allow quick editing of its group, pricing and stock levels.

The contents of this grid is controlled by the filter button below it, on opening the dialog the default it to show All stock in All Stone Groups

Deactivating unused Stones

To deactivate a stone and hide it from the available stone list for future orders remove the tick from the Active check box:

Once the check mark is removed a message will be displayed informing you the Stone has been marked as Inactive.

Activating a deactivated stone

By default the form only shows Active stone items, to show inactive stones click the filter button and choose either to show All or Show inactive stones then replace the check mark in the Active (see page 9 for more details on the Filter form)

Find & Replace Buttons

	The find button allow you to search through the descriptions for any text, subject to the critera set in the find dialog.	
	The replace button allow you to search and replace text in descriptions, subject to the critera set in the repalce dialog.	
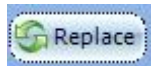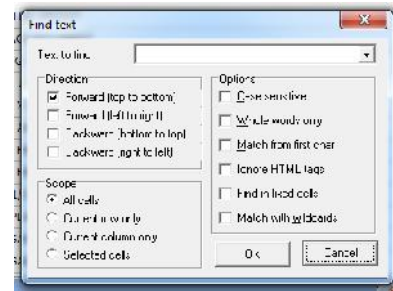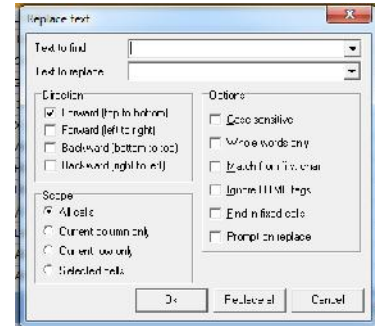
Wildcards

The Wildcards available are:

> * For a word or sentence fragment.
> ? For an individual letter.

When searching for an individual word or phrase you should use wild cards. For example to find the word BLUE you would search for *BLUE* to find BLUE anywhere in the description or BLUE* for find it at the start of a description.

Filter Button

Opens the filter dialog to allow filtering by group well as showing active, inactive or all the stock in the stone group.

First select what stone group to filter then select the active state to show.

To apply the filter click Done.
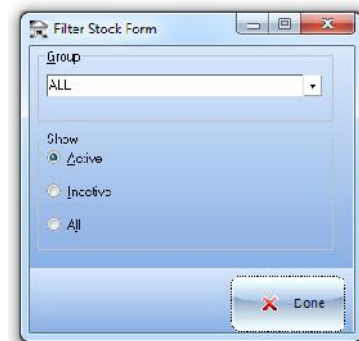
If no matching records are found the program will automatically reset back to showing all stones

New Accessories Button

Prompts for the name of the new accessory.

Clicking Ok creates the new item description, which can then be edited in the Accessory panel:
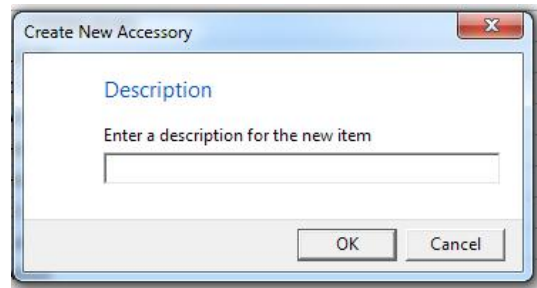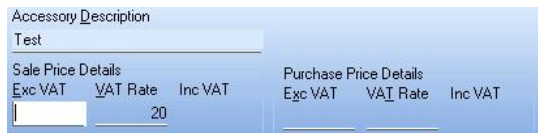
Clicking Cancel returns to the 'Custom Stones & Extras Dialog'; without creating a new accessory.

Tools Button

Opens the tools menu:

Print

All Stock
Prints all the stock in the stones table (Stones & Accessories).

Stones Only
Only prints items that are stones.

Accessories Only
Only prints items that are Accessories.

Catalogue Manager
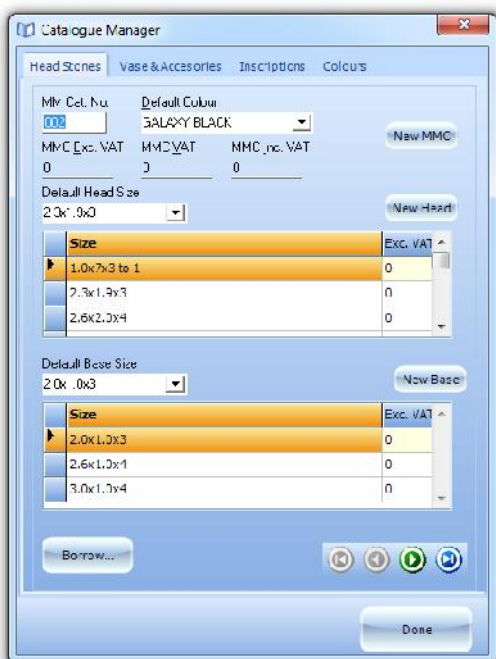
The catalogue manager is used to manage the price and default settings for items from the printed catalogue, the catalogue items are broken into four categories:

- ➢ Head Stones
- ➢ Vase & Accessories
- ➢ Inscriptions
- ➢ Colours

Head Stones

For each Headstone there is a base price, which is the cheapest configuration of Colour, Head & Base Sizes onto which the difference in price for colour, head and base stone is added so for each item (see above).

New MMC

Allows the creation of a new head stone catalogue entry, the catalogue number is automatically assigned the 'Head' and 'Base' size grids will start empty

New Head Button

Allows the creation of a new head size with its start pricing and which colour tier should be applied. The fist size created will be the default size, this can be changed to any other size by checking the 'Use As Default' check box
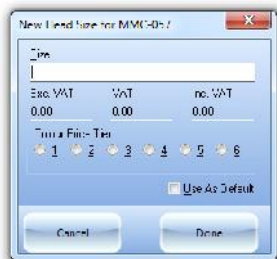
New Base Button

Allows the creation of a new base size with its start pricing and which colour tier should be applied. The fist size created will be the default size, this can be changed to any other size by checking the 'Use As Default' check box

Borrow Button

If a catalogue item has been created that has the same head or base sizes as the new catalogue item you can borrow these descriptions and prices for the current item. Clicking the borrow button opens the 'Borrow Dialog'

Click the 'Select MMC No to borrow from'

Once a number is selected place a check by the details to borrow into the current item.

Placing a check in the 'Head Sizes' box borrows all of the head sizes into the current item.

Placing a check in the 'Base Sizes' box borrows all of the base sizes into the current item.

The Default Head, Base and Colour check boxes borrow the Default Head, Base and Colour setting from the selected catalogue item to the new item.

To cancel borrowing click the cancel button to complete the borrow click the borrow button
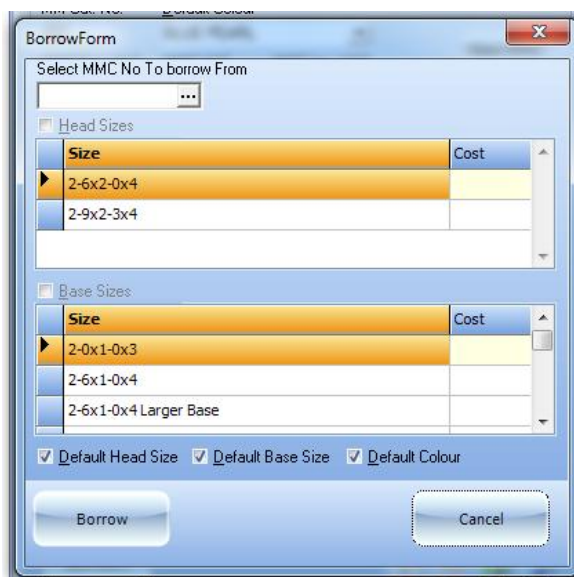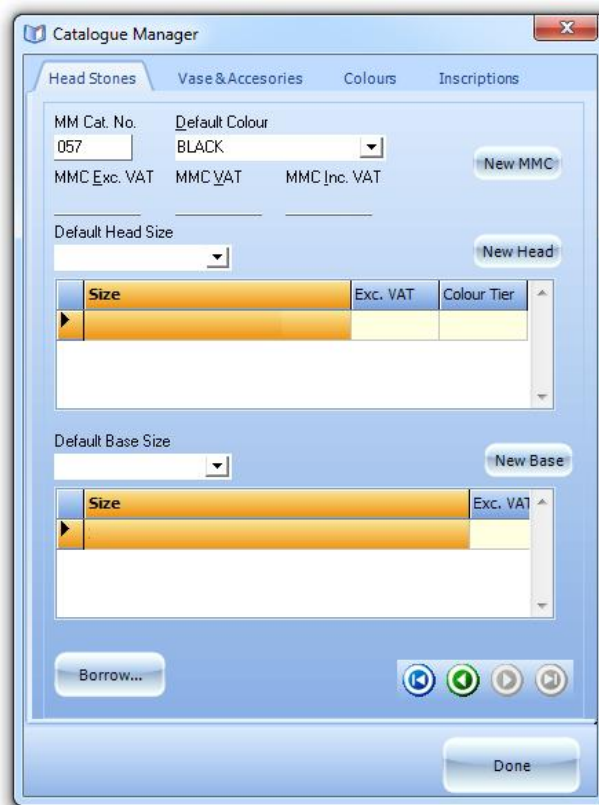
Vases & Accessories

New MMC

Clicking the New MMC button create a new Vase/Accessory with the Price and Sizes blank, MMC number is automatically assigned

Entering a price in the Exc. Vat field automatically calculates the VAT and Inc Vat price or entering a price in the Inc Vat field will calculate the VAT and Exc. Vat prices

New Size
Clicking New Size creates a new size for the current Vase/Accessory

Vase/Accessory Navigator

Used to move through existing Vases/Accessories

Colours

Used to create the Colours and there pricing tiers for stones and vases in the catalogue.

Each colour can have six pricing tier plus a vase tier.

The tier price is added to the base price when that colour and tier are selected, in this example 'Bahama Blue' and Tier 3 will add £50 + VAT to the item cost when that combination are selected for a head stone size.

Price information can be entered as either the Inc. or Exc. VAT prices. Entering the Inc. VAT price calculates the VAT and Exc. VAT and entering the Exc. VAT price calculates the VAT and Inc. VAT price. If input is started in either the Exc. or Inc. VAT prices the remaining fields are automatically blanked until the field is exited or the enter key pressed.

Inscriptions
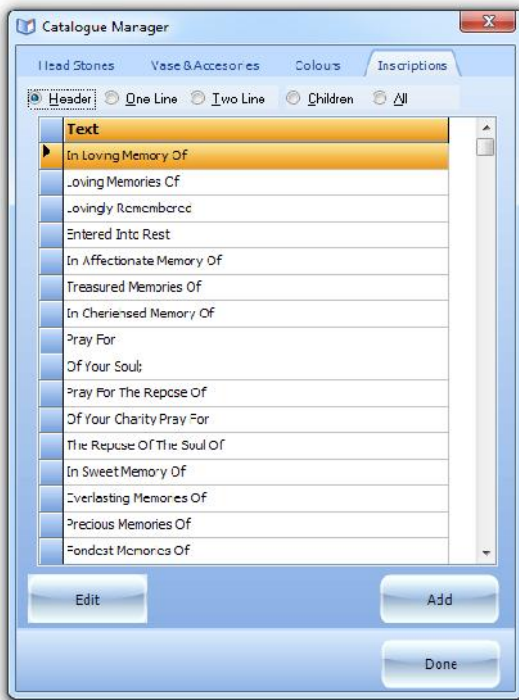
Create/edit sample inscriptions for the inscription builder

**Future feature

Utilities

Backup

See Appendix A for instructions on using the Backup utility

Custom Report Builder

See Appendix B for instructions on using the Report Builder

SQL Builder

Allows you to create, save, edit and execute Structured Query Language operations on your data, these can then be used in the custom report builder

Change Defaults

- o Vat Rate
- o Number of free letters
- o Lettering Price
- o Photo Tile
- o Job Screen Colours
- o Kerbs & Tubs
- o Chipping Price

Vat Rate

Use to set the default VAT rate to change the default rate that VAT is calculated on all new orders, also updates the default VAT rate on stones.

This action cannot be undone but the default VAT rate can be set back to the previous value by re-entering it in this dialog box.

Number of free letters
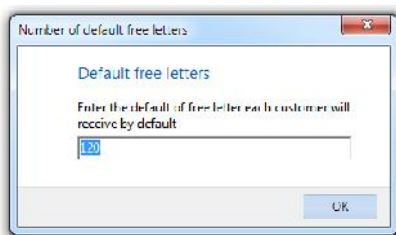
Use to set the default number of free letters on all new orders.

This action cannot be undone but the default number of free letters can be set back to the previous value by re-entering it in this dialog box.

Note
If you set the free letters to zero (0) the next time you start the program you will receive a warning that the free letters have been set to zero.

Lettering Price

Use this dialog to add new lettering styles and edit prices of existing styles.

Editing existing prices

Use the navigation bar (◉◎◉◈) to move through the existing lettering styles to the styles' price that is to be changed, click on the <u>C</u>ost Exc. Vat box and enter the new price Exc. VAT.

Create a New Lettering Style

Click the 'Add' Button to add a new description:

Once you've entered a new description you will be returned to the 'Lettering Style and Price' Dialog to so you can enter the new price.

Photo Tiles

Use this option to change the default prices for Photo Tiles, remember to leave 'No Tile' set to 0.00 (Zero) as changing this may cause pricing problems later.

When you click on the menu item the Main Form will disappear and you will be presented with the form shown left.

Click on the Photo Tile in the top grid to quickly go to that item.

Note
Once a tile has been saved it cannot be deleted and the description cannot be changed only the pricing may be changed once the tile is created.

Create a new Photo Tile price

To create a new Photo Tile and Price click the 'Add' button, and then enter a description for the photo tile, remember once you close this form, or move away from the current record using the navigator (◉◎◉◈) buttons, you cannot change the photo tile name.

Allocating a price can be done in one of two ways either:

<u>Start with the price Excluding VAT</u>
Enter a price in the <u>E</u>xc. VAT field the form will then calculate the VAT and the resulting <u>I</u>nc VAT price

OR

<u>Start with the price Including VAT</u>
Enter a price in the <u>I</u>nc. VAT field the form will then calculate the VAT and the resulting <u>E</u>xc.VAT price

Change an Existing Photo Tile price

First navigate to the price you would like to change then click the Clear button and follow the instructions for 'Create a new Photo Tile price'

Kerbs & Tubs

Colour

Kerb

To add a new colour click the Add button in the Colour panel to open a blank 'New Colour' Dialog:

Enter a description for the new colour and price, once saved descriptions cannot be changed.

To edit price information for the currently selected Colour click the Edit button

To add a new kerb click the Add button in the Kerb panel to open a blank 'New Kerb' Dialog:

Enter a description for the new Kerb and price, once saved descriptions cannot be changed.

To edit price information for the currently selected Kerb click the Edit button

Foot Stones

To add a new foot stone click the Add button in the Colour panel to open a blank 'New Foot Stone' Dialog:
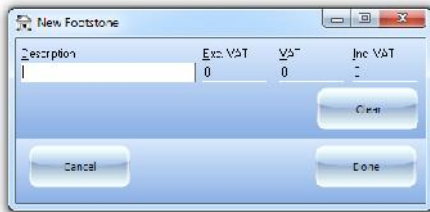
Enter a description for the new foot stone and price, once saved descriptions cannot be changed.

To edit price information for the currently selected foot stone click the Edit button

Pebbles/Chippings

To add new Pebbles click the Add button in the Pebbles panel to open a blank 'New Pebbles' Dialog:

To add new Chippings click the Add button in the Chippings panel to open a blank 'New Chippings' Dialog:

Enter a description for the new Pebbles and price, once saved descriptions cannot be changed.

To edit price information for the currently selected foot stone click the Edit button

Enter a description for the new Chippings and price, once saved descriptions cannot be changed.

To edit price information for the currently selected foot stone click the Edit button

Tubs/BTubs

To add a new Tub click the Add button in the Tub panel to open a blank 'New Tub' Dialog:

To add a new BTub click the Add button in the BTub panel to open a blank 'New BTub' Dialog:

Enter a description for the new Tub and price, once saved descriptions cannot be changed.

To edit price information for the currently selected foot stone click the Edit button

Enter a description for the new BTub and price, once saved descriptions cannot be changed.

To edit price information for the currently selected foot stone click the Edit button

Blank descriptions will not be saved.

Price information can be entered in either the Exc. or Inc. VAT fields, the VAT and Inc. Or Exc. VAT prices are automatically calculated.

Job Screen Colours

Use this option to access the Job Screen Colours default settings:
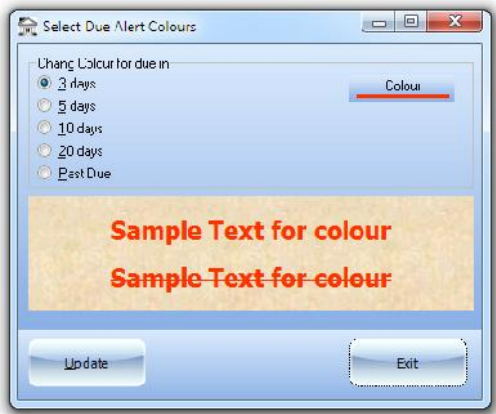
To change the default highlighting colour for the job screen click on the time band you want to change:

Band 1 – 3 working days until the job is due
Band 2 – 5 working days until the job is due
Band 3 – 10 working days until the job is due
Band 4 – 20 working days until the job is due
Band 5 – Past Due

Clicking on the radio button will change the sample text to the currently selected colour for that band

Click on the colour button to bring up the colour box:

Highlight the colour you want to use for the selected band, once a colour is clicked the colour box will close and the sample text will be updated with the new colour, if your happy with how the colour appears then click the update button to apply the change.
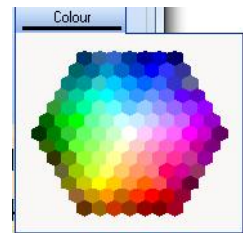
> **Note**
> The colour changes may take up to five seconds to appear on the jobs screen.

About

Shows information about the program and operating environment

Version
The version number of the currently running program

Operating System
The name of the operating system the program is running on

PC name
The Network name of the current computer

System Folders
Location of the windows system files, may be needed for debugging purposes

Clicking on the copyright line will take you to the Section One Website if the computer is connected to the internet

Sort By

To the right of the main tasks there is a 'Sort by' control:

This allows you to change the order in which the Job Grid, below the task bar, displays the orders. The currently active sort order is indicated by the green 'LED' and, by default, is the Due Date.

Order Grid

The order grid which, occupies most of the main form; by default, shows all active orders in 'due date' order. Several of the other controls, detailed in the 'Other Controls' section below, will change:

- ∫ what is shown
- ∫ the order in which it is shown
- ∫ allow access to additional controls

Double clicking on an order will open the order to allow editing, viewing and printing of that order.

Right Clicking an order will bring up the pop-up menu to allow access to the options:

- ∫ Change due date
- ∫ View/Edit Information
- ∫ View/Edit Order Notes
- ∫ Top Copy received
- ∫ Mark as complete

Change due date
Allow the due date to be changed without opening the order form

View/Edit Information
Allows the additional information, shown in the information section of the grid to be viewed in full or edited.

View/Edit Order Notes
Allows the notes made at the time or order or added later on the Order Form to be viewed or edited

Top Copy received
Allows you to mark the top copy as received, if this item is selected after the top copy has been received it shows the date it was received and allows you to change the date if required

Mark as complete
If the balance of the invoice is not zero this option is inactive (will appear greyed out).
It allows you to mark the order as complete, once marked as complete the order will no longer appear in the orders grid when the 'Show Only Active Orders' control is set to on.

Balloon Information

Many of the columns on the Main Screen will show additional information if the mouse is allowed to hover over a record, this information is:

Column	Extra Details
Order Id	Order ID and Workshop Unique reference
Name	Address and Contact Details
Due Date	Show how many calendar days are left until due
Information	If the order information and/or order notes fields have been completed this will appear
TC	Shows the date the top copy was received

Other Controls

Sort by
Allows you to toggle between showing the orders in due date order or date taken order

Showing Only Active Orders/Showing All Orders
When set to on (green – show only active orders) shows only the active orders in the grid – this is the default action of this control.

When set to off (red – showing all orders) shows all the orders and brings up the search footer on the grid

Show Incy

When set to on (green) shows only Incy Orders

When set to off (red) – this is the default action of this control.

Show Unpaid

When set to on (green) shows only Unpaid Orders (i.e. Orders that have a balance due of more than Zero)

When set to off (red) shows all active orders – this is the default action of this control.

Main Form Button Bar

Print

Clicking the print button opens the Print Jobs Form:

This allows you to select what jobs to include in the report, you can select from

- ➢ All Active
- ➢ First x Active Jobs
- ➢ Last x Active Jobs
- ➢ Active Due Date Range
- ➢ All Jobs Due Date Range

Once the criteria have been set, as to what orders are to be included in the 'Job List', click the print button to produce the report. When the print button is clicked there may be a delay, depending on system and/or network speed, a progress bar will appear to indicate that the report is being processed
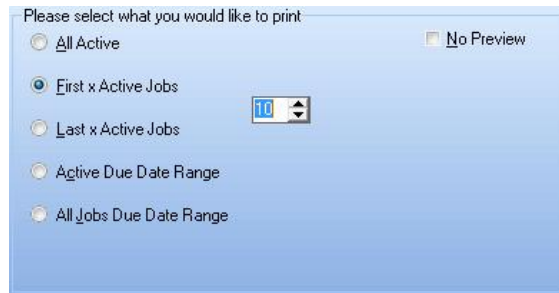
When done, or to return to the Main Form, click the 'Done' button.

All Active

Includes all active jobs (i.e. everything on the active database grid)

First x Active Jobs

Allows the selection of the number of jobs, from the first active record to the quantity you select or enter, in the 'Jobs List' report. Once the radio button is selected you will be given a spin edit to select the number of jobs to include in the report, by default this is 10:

To change the value click the up arrow to increment the number of Jobs or down arrow to decrement the number of Jobs to include, alternatively type the number into the field.

Last x Active Jobs

Allows the selection of the number of jobs, from the last active record to the quantity you select or enter, in the 'Jobs List' report. Once the radio button is selected you will be given a spin edit to select the number of jobs to include in the report, by default this is 10. See 'First x Active Jobs' for details on changing the number of jobs.

Active Due Date Range

Allows the selection of Active jobs within a date range

By default the start date is Seven Calendar Days prior to the current system date and end date seven days ahead of the system date.
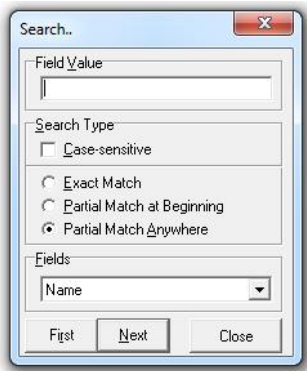
No Preview

Placing a tick in this box will, when the print button is clicked, send the report straight to the default printer without showing a preview first.

All Jobs Due Date Range

Allows the selection jobs within a date range whether they are active or not.

Search

Opens the Search Dialogue:

Type in the 'Field Value' box the information to search for.

By default the search will be carried out on the Name field and is case insensitive and matched are located anywhere within the field. To narrow the criteria place a tick box in the Case-sensitive box to make search sensitive to case or move the radio button for Exact Match or Partial match at beginning.

Once the criteria have been set click the 'First' or 'Next' buttons to start the search. If a match is found the active record will be set to the first, record, that matches the criteria in the search box. Should there be more than one matching record or to try searching further into the database click the Next button. When done click the 'Close' button, the last matching record will be left highlighted.

Note

The Search scope will be limited by whatever options are active on the grid when you click on the Search button so, for example, if 'Show only active orders' is set then the search will be limited to active orders.

New Order

Clicking this creates a new order and opens the Order Editing Screen

Section & Grave

Opens the 'Filter Section & Grave' dialog, shown right.

This dialog allows you to filter the active jobs by the section and/or grave reference.

Note that it is punctuation sensitive so CH16 is not the same as CH-16

If, after entering a Section and/or Grave, matching records are found the main jobs list will only show these records and the 'Section & Grave' button will change to 'Remove Filter'. To remove the filter, and restore the active jobs list, click:
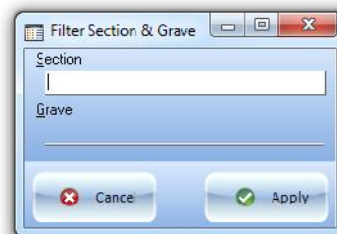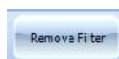
If no records match the criteria entered you will see an error message indicating no records matched the criteria, as shown right, and control will be returned to the 'Filter Section & Grave' dialog,

At any point on the 'Filter Section & Grave' dialog clicking the Cancel button will close the dialog and return to the main form without applying a filter.

Exit

Click this to close the program and exit back to your windows desktop

Order Screen

This screen is used to capture the information needed to process an order:

Etching Button

Use this to add additional standard stock items and/or services

Custom Order Button

Allows the addition of a Stone from list of active stones created in the Custom Stones Form, the appeance of the button will change:

There is no custom stone on the order
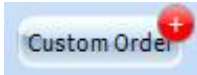
A custom stone is on the order

Clicking on the custom order button will open the Choose Custom Stone Form, if there is already a stone on the order it will be highlighted and selected:

Click the stone required for the order. If the order already had a stone selected and the default price has been changed from the one on the order will be notified that the price has not been changed:
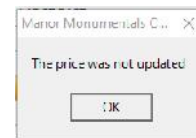
If a different stone has been selected the order will be updated with the new stone and price.

To apply a new price for an existing stone the stone must be removed from the order using the Remove button.

Changing Custom Stone

If the order already had a custom stone on it and a different stone is selected when the form is close a prompt asking if the order should be updated will be displayed.

This is the last chance to automatically undo any changes.

If the incorrect stone is saved the correct one can be re-added by returning to the form and selecting, however this will apply the current default price to the order.
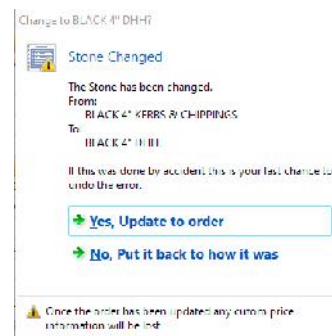
Remove Button

Click this to remove the current stone from the order and set the stone price to Zero

Custom Stone Button

This takes you to the Custom Stones Form (see page 7 for details of how to use this form)

Find… Button

Opens the find stone dialogue:

Type the stone name in the search characters box, click OK to select the stone or click Cancel to leave without changing the stone.
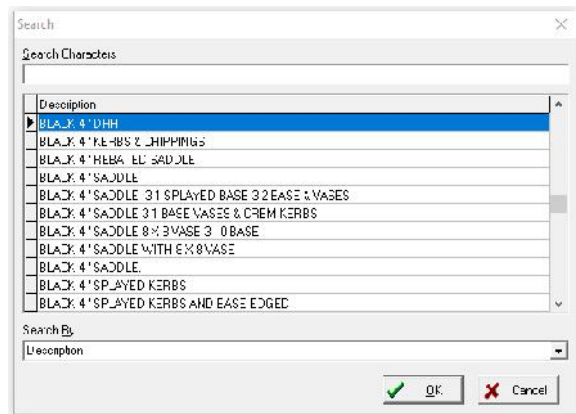
Done Button

Save any applicable changes and return you to the order form.

Sundries Button

Use this to add 'ad-hoc' items and/or services.

Creating the first Sundry

The first time the Sundry button is clicked on an order will be present you with the 'New Sundry' form:

You must enter a description of the item or service along with a price, if you change your mind about adding the item click the delete button. You may go back and change the description and/or price at any time.

Adding, Editing or Deleting Sundries

If one or more Sundries have already been created on the order when you click the Sundries button again the 'Sundries' form will open:
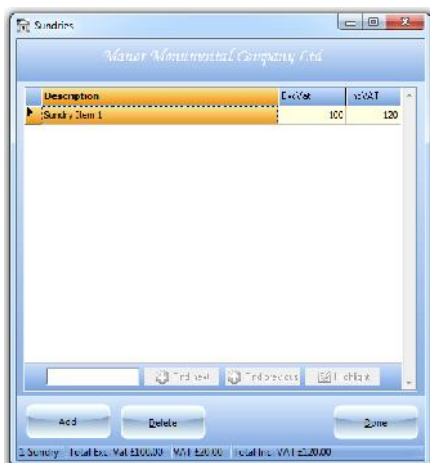
From here you can add more sundry items, delete existing sundry items or edit previously created sundry items. Also the status bar at the bottom of the screen shows how many Sundries are on the order as well as the total for the Sundries. If all the Sundries are removed from the order the next time the sundry button is clicked it will open the 'New Sundry' form rather than the 'Sundries' form shown above.

Adding an additional sundry

Click the add button to open the 'New Sundry' form and follow the instructions for 'Creating the first Sundry'. After creating each new item the program will return to the 'Sundries' form, once all the additional sundries have been added click the Done button to return to the order form.

Editing a sundry

From the sundries grid, highlighted to the right.
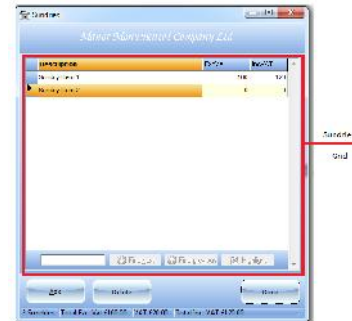
Double click on the item to be edited, this will open the edit sundry form, the edit summary form works in the same way as the 'New Sundry' form

Deleting a sundry
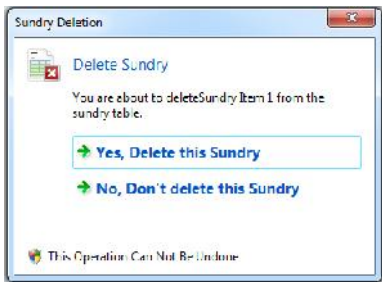
To delete an existing Sundry item:

Highlight the Sundry, in the Sundries Grid, that is to be deleted and click the delete button, you will be asked to confirm the action

Inscription

New Inscription
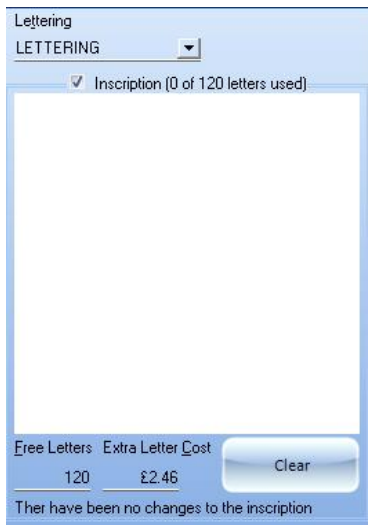
When an order is created, that requires an inscription, the inscription text can be entered in the space provided.

When typing an inscription the program will calculate the number of chargeable letters used and cost based on the free letter setting and extra letter cost shown under the inscription panel, also, if there are previously saved revisions the number saved will be shown blow these setting otherwise the message 'There have been no changes to the inscription will be shown.

The number of Free Letters and extra letter cost can be changed for each order; without changing or effecting the default letter price or number of free letters. To change default letter pricing go to the Main Program Screen Tools -> Change Defaults -> Letter Pricing or to change default free letters, from the same screen, go to Tools -> Change Defaults -> No. Free Letters.

Editing an inscription

Once the order is saved and reopened for editing the inscription box remains locked until you place a tick in the box next to inscription:
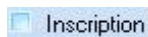
Note

Until this is checked you cannot edit the text, free letters or letter cost; nor can you clear the details.
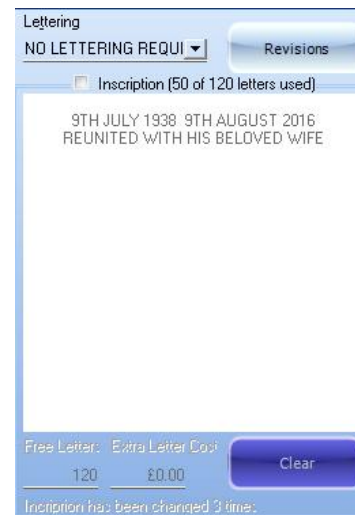
Reviewing Edits or Returning to a Previous Inscription
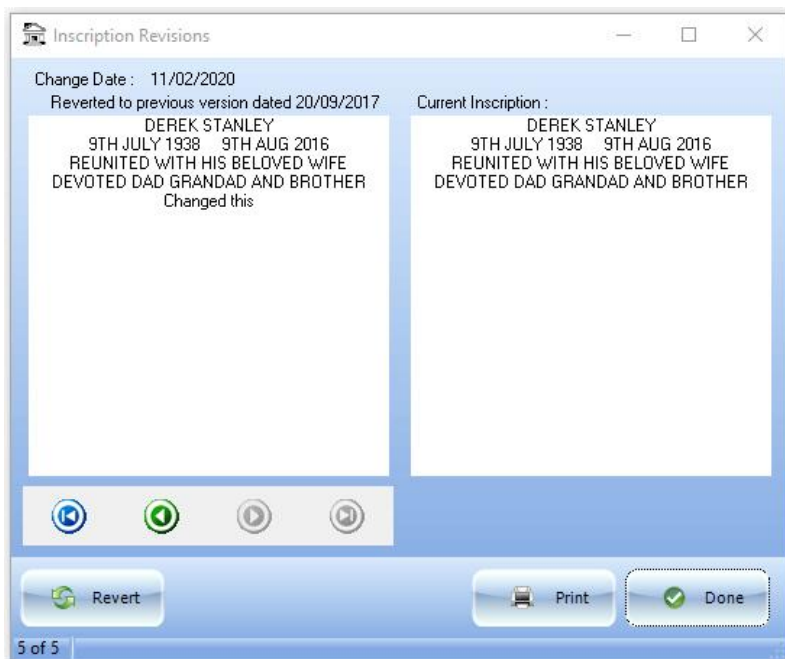
If the inscription has been changed all previously saved inscriptions, for the open order, are saved and can be accessed by clicking the Revisions button.
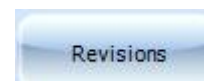
Clicking this opens the 'Inscription Revisions' Dialog (left).

The right hand panel shows the current inscription, the left the previously saved inscriptions which can be moved through using the navigator:

To revert to a previously saved inscription click the 'Revert' Button, this will copy the text shown in the left panel back to the current order.

If you revert to a previously saved inscription the current inscription is also saved and can be returned to at a later date.

Printing Revision History

To print the full history of revisions made to the inscription click the print button

Tracking Revisions

When an inscription is changed, either by editing the text or reverting to a previous inscription, and the order saved you will be prompted for the reason the order was changed. As the most likely reason is a customer request this is the default, if this is not the reason then enter a short description as to why the order was changed. The time and date of the change is automatically recorded.
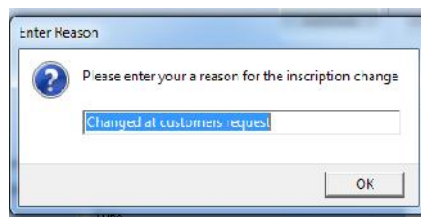
It is important to track changes accurately to prevent miscommunication later.

Kerbs Button

Click the Kerbs button to add Kerb Details as well as any pebbles or chipping requirements. If these details have been added to an order the button will have a '+' indicator to show details are present, hovering over the button will show the details as they will appear on the Quote/Work/Invoice/Receipt forms.

When the Kerb Side is changed from 'NONE' the Colour will, by default, change to 'BLACK'

Clicking on either the Pebbles or Chippings Radio Button will allow the selection of Quantity and Colour:

If a Kerb Side has been set the default Quantity for Graves will be 3 or for Cremations 1.

To reset the kerb details to 'NONE' click the clear button or set 'Kerb Side' to 'NONE', the latter option will require confirmation to reset Pebbles/Chippings

Order Notes Button

Allows ad hoc notes and comments to be added to the order via a 'Wordpad' like interface:
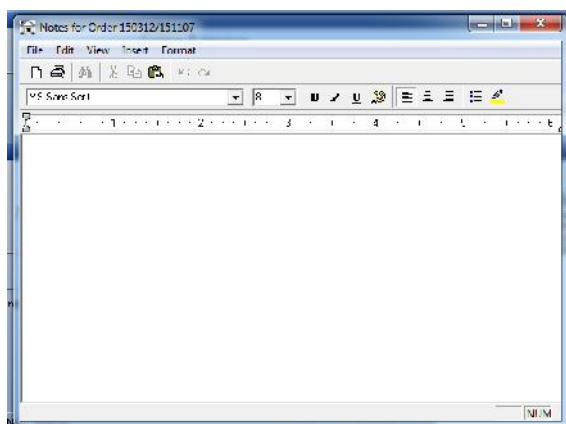
Catalogue Button

This button opens the Catalogue Form which allows the addition and customisation of items from the printed catalogue to the order without having to use the custom options used previously. If a catalogue item has already been added to the order then the button will show the Catalogue Number in three digit format (i.e. Catalogue item 2 is shown as 002, 20 as 020).

When first opened the form will default to the first item in the catalogue that is not a Vase/Splay or Accessory and populate the form with the default settings configured in the catalogue manager (See Page xxx for details on the catalogue manager). If a catalogue item has already been added to the order then it and anty custom options will be displayed instead of the default item.

MMC Code

Select the catalogue item to add to the order, either by using the drop down box or by entering the 'Catalogue Number' into the MMC Code box.

Note – When manually entering the catalogue number it is not necessary to type the preceding zeros for example for catalogue item 009 only the 9 need be type or for 030 only 30 need be typed the program will automatically add nay required preceding zero.

Colour

Use the drop down box to select a different colour.

Note – changing the colour will remove any custom price information unless the Cancel button is clicked (in which case no changes are saved)

Head & Base Sizes

Use these drop down boxes to select from the different standard sizes available for the chosen catalogue item or enter a custom size in the box.

Note – changing a size will remove any custom information unless the Cancel button is clicked (in which case no changes are saved)

Catalogue form – Cancel Button
Closes the form but does not save any changes

Catalogue form – Remove Button
Closes the Form and removes the catalogue item from the order

Catalogue form – Done Button
Saves any changes made to the order and closes the form

Vase Button

This button opens the Vase Form which allows the addition and customisation of Vases/Splays & Accessories from the printed catalogue to the order without having to use the 'Additions' or 'Sundry' options used previously. If Vases/Splays & Accessories have already been added to the order the Vase button will indicate how many optional items have been added and hovering over it will show what catalogue items have been added and the total (Exc. VAT) of the items that has been added to the order.

To add a Vase/Splay or Accessory to the order using the default catalogue options place a tick in the check box by the item to add. To add an item with custom options or multiples of the same item double click on the item to open the customisation form:

Check Boxes

There are a number of checkboxes to allow various options to quickly be added to the order, these boxes are for:

- Photo Tile
- Flower Container
- New Foundation
- R&R
- Incy
- NAMM Pinning
- Picture Frame
- Clean
- Tubs

Photo Tile

After creating a list of Photo tiles from the main screens tools menu photo tiles can be added to any order.
To add a photo tile to the order clicking on this check box to open the Add Photo Tile dialogue as shown below.

If no Photo Tile was on the order the Add Photo Tile dialogue appears and allows the selection of any tile from those available.

Click on the required tile from the list and click 'Done'

If there was already a tile on the order then the view/change dialogue will open, to remove the tile from the order click 'No Tile'

It is not necessary to open the View/Change Photo Tile Dialogue to find out which tile is on the order, simply hover over the Photo Tile check box will show a hint with the selected Tile in it:
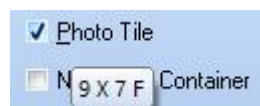
Flower Container

Clicking the Flower Container option opens the flower container options dialogue:
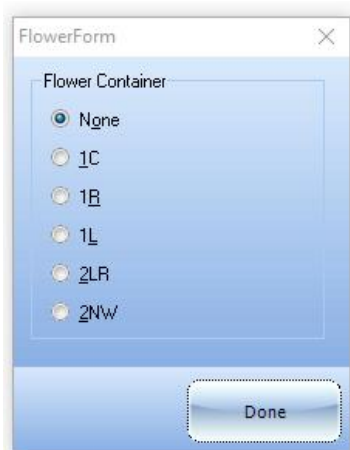
Click the option required
None
1C for One centre
1R for One Right
1L for One Left
2LR for One Left and One Right
2NW for One Top and One Bottom

To remove a flour container, or not add one, click the None option.

When a Flower Container is on an order the Flower Container Check box will have a tick in it, hovering over the check box will show which option has been chosen:

New Foundation

To add a New Foundation to the order click the box by New Foundation to put a tick in the box, to remove the option click again:

Without New Foundation   With New Foundation

Note

When 'New foundation' is removed from an order a warning message is displayed:
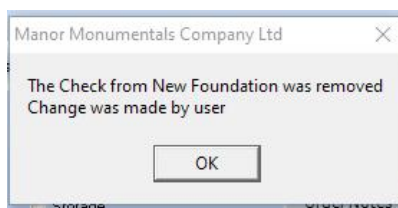
R&R – Remove & Restore

To add a Remove and Restore task to the order click the check box by R&R, this will open the Remove and Restore dialogue so the items to be R&R'd:

Place a tick by the items to be R&R'd.
When done click the 'Done' button to close the dialogue

If Kerbs are selected a price will need to be specified

If no price for Kerbs R&R is entered a warning message will be displayed an the item removed from the order:

To remove R&R options click on the R&R check box again and remove the check boxes from the selected items.

Incy

To make this an INCY order; click the box by INCY to put a tick in the box, to remove the option click again:

Not an INCY Order

INCY Order

NAMM Pinning

To add NAMM Pinning to the order click the box by Namm Pinning to put a tick in the box, to remove the option click again:

No NAMM Pinning

☐ Namm Pinning

With NAMM Pinning

☑ Namm Pinning

Note

Adding NAMM Pinning to the order also adds a ground anchor and removing NAMM pinning automatically removes this, a warning will appear:

Manor Monumentals Company Ltd   ✕

The Check from Namm Pinning was removed by default this removes Ground Anchor Change was made by user

OK

Picture Frame

To add a Picture Frame to the order click the box by Picture Frame to put a tick in the box, to remove the option click again:
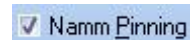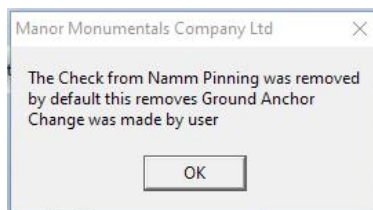
No Picture Frame

☐ Picture Frame

Picture Frame

☑ Picture Frame
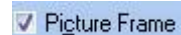
Clean

To add a Clean to the order click the box by the Clean option, this opens the clean pricing dialogue box:

Clean Price

Cleaning Price

◉ None

◯ Custom Price:

Exc. VAT	VAT	Inc. VAT
0.00	0.00	0.00

Clear   Done

Click the Custom Price radio button to enter a price.

Completing the Exc. VAT price will auto calculate the VAT and Inc. VAT price; completing the Inc. VAT price will auto calculate the VAT and Exc. VAT price.

When done click the Done button to save the changes or the Clear button to remove the price and reset the cleaning option to None

When the cleaning option is added to an order the box will have a check mark by it and the price (Exc. VAT) shown underneath:

☑ Clean
Other £100.00
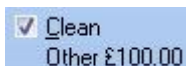
Tubs

To add Tubs to the order click the check box by the left of the Tubs option to open the Tubs dialogue:
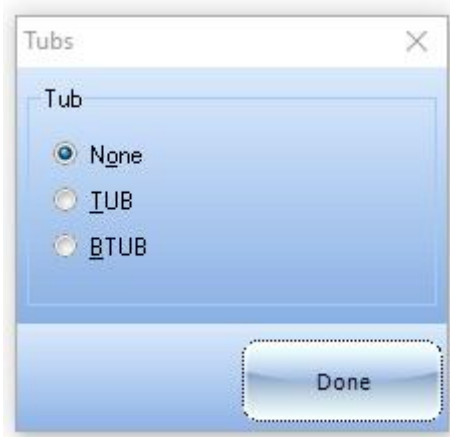

Select the tub option required or select None to remove the Tub from the order.

If TUB or BTUB is selected the option to select the type of Tub will appear:
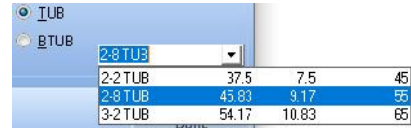
Note on Prices
Prices are shown as a floating point representation rather than currency so 37.5 is the same as £37.50

Note on Tub & Btub pricing and options

TUB and BTUB options and pricing are set from the Main Screen from the Tools Menu; Change Defaults -> Kerb & Tubs. (See page xx)
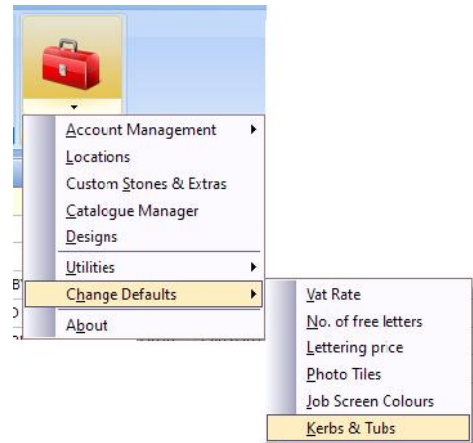
If a Tub is present on the order the tubs option will have a Check mark by it and so the, Exc. VAT, price:

Without Tub

With Tub

Hovering the mouse pointer over the Tub option, when checked, will show which TUB or BTUB is on the order:

Order Form Button Bar

Print Button

'Print…' form

This form gives you the option to print one, or more, of these reports by placing a tick in the box next to the relevant report:

- ➢ Quote
- ➢ Worksheet
- ➢ Invoice
- ➢ Statement
- ➢ Revisions

As well as some options as to what is included and how the reports are printed.

Quote
When ticked will print a copy of the quotation

Worksheet
When ticked will print a copy of the worksheet

Invoice
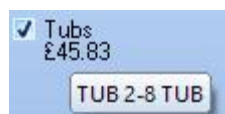When ticked will print a copy of the Invoice

Statement
When ticked will print a statement of the account showing order total, payments made, total payment and balance due. This report is only available if payments have been made and can also be printer from the payments form.

Revisions
This option will only appear if revisions have been saved to the inscription and will print all the saved revisions, to the inscription, the details include date of revision, supplied reason for the change and what the inscription was changed to. The hide Inscription check box has no effect on this report.

Invoice Printing Option
By default the inscription is not printed on the invoice, only the quote & worksheet, to include the inscription on the invoice remove the tick from:

☑ Hide Invoice Inscription

When left ticked, like this, the inscription is not printed on the invoice

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Print with, or without, preview
Place a tick by the report or reports that you require printing, by default a preview of each report will be generated unless the no preview box is ticked:

☐ No Preview

When left un-ticked, like this, a preview of each report is generated before it is printed

The print what form 'All' Button

If all the reports are required click the 'All' ( ) button and this will place tick by all of the reports, it will also tick the 'No Preview' option. When clicked the 'All' Button will change to 'None' clicking the 'None' button ( ) will remove all the ticks from the reports and 'No Preview' box.

'All' Button Notes

1. If after clicking the 'All' button any of the reports are deselected the button will remain set to 'None' until it is clicked again, clicking it will work the same as if all the reports were ticked in that any reports still ticked will have the tick removed and, if there is one, the 'No Preview' box will have its tick removed.

2. The 'All' button has no effect on the 'Stateneb' check box (i.e. it does not activate, select or deselect the statement option)

Once all the reports, that are needed for printing, have been selected along with any required options click the 'Print' button, note that if the preview option has been selected the Print button on each preview page will have to be clicked in order to complete the print process for each item.

Print... form Exit Button

Click the Exit button to return to the previous screen when all printing requirements are complete.

Clear Button

Click this to reset the order so it is the same as when a new order was created, note that any customisations and pricing will be lost and this action cannot be undone

Payments Button

When a customer makes full or part payment on an order, or to view change or remove that have been made, as well as print 'Statements of Account' click the Payments button to open the 'Payments' Form.

If the customer is making a part payment click the 'Receive Payment' Button or if the full Balance is being paid click the Balance button, see below for changing or removing payments.

Receiving a Payment

Clicking this opens the 'Payment Amount' Dialog (right).

Enter the amount being received, any amount up to the full balance can be entered or, if the client is paying the full balance, click on the 'Full Balance' button. Once the amount has been typed into to input box click the OK button. If the amount being paid has not cleared the full balance a dialogue will appear showing the amount being received and the amount still due for example:
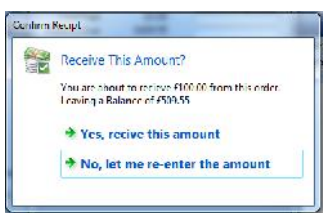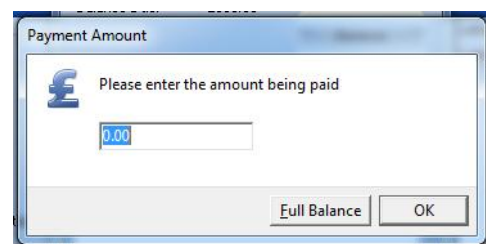
To complete the transaction click Yes, receive this amount or to enter a different amount click the No, let me re-enter the amount. Clicking 'Yes' will go back to the 'Payments' Dialogue. Clicking No will go back to the 'Payment Amount' Dialog.

Receiving Payment using the Balance Button

Clicking the Balance button brings up the receive balance confirmation

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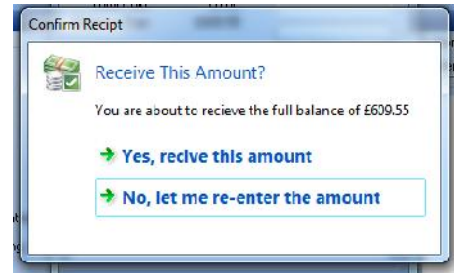
Note

If payments have previously been made this will create another payment in the 'Payment History' equal to the total outstanding, it will not replace or remove previous payments, see below for information on how to edit/remove payments.

Changing or deleting a payment

To change the amount paid, or delete a payment, double click on the payment in the 'Payment History' Grid, highlighted by red square (right).

This will open the 'Edit Payment' Dialogue:
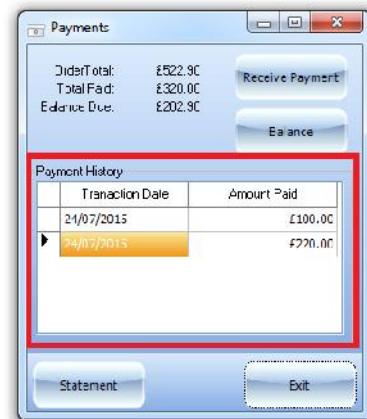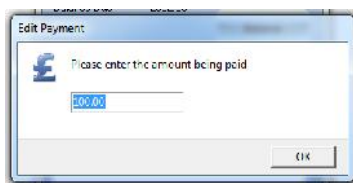
Enter the new amount of the payment or, to remove the payment, enter 0.00 and click OK.

Note

In the edit payments dialogue there is no option to receive the full balance to do this close the 'Edit Payment' dialogue to return to the 'Payments Form' and click the 'Balance' button.

Exit Button

Once all the required changes and/or reports are complete click the 'Exit' Button to close the 'Payments' form.

Statement Button

The statement button becomes available once one, or more, payments have been made; clicking this button generates the same report as that printed from the main 'Order Form' (see page 18 for details).

Discount Button

To apply a, ad hoc, discount to the current order use the Discount button to open the discount dialogue.
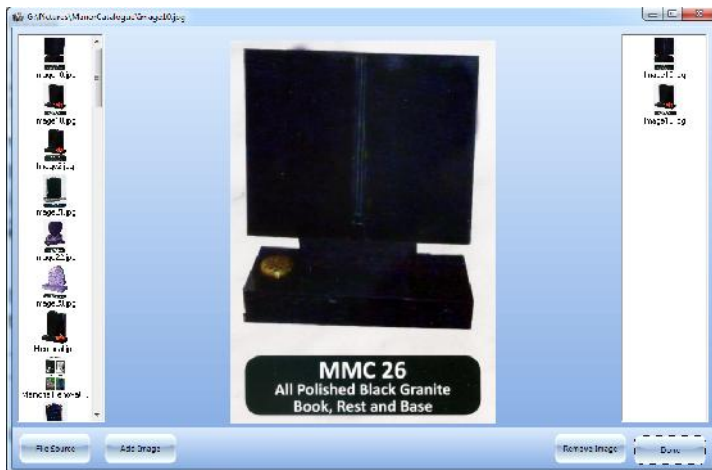
Enter the amount to apply as a discount in either the Exc. VAT or Inc. VAT fields, the VAT and Inc. or Exc. amounts will be calculated automatically.

To remove a discount click the clear button

When Done, click the Done button to return to the order form.

Pictures Button

Allows pictures to be associated with the order, clicking it opens the pictures form:

The left thumb nail list shows images available to add to this order.

Single Click on any thumbnail in the left thumbnails to preview it.

Double click the thumbnail (or click 'Add Image') to add the currently highlighted picture, in the left thumbnail list, to the order

The Right thumbnail list shows the pictures that have been associated with this order.

Double click the thumbnail (or click 'Remove Image') to remove the currently highlighted picture, in the right thumbnail list, from the order

To browse a different location for images click the 'File Source' button to open the file browse.

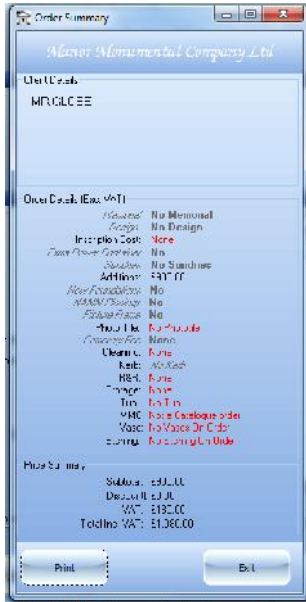Only .JPG format images can be used.

By default the form will attempt to browse the last location pictures were read from on any computer.

Note
If pictures are already associated with the order then the number of pictures attached will be shown on the buttons status bubble.
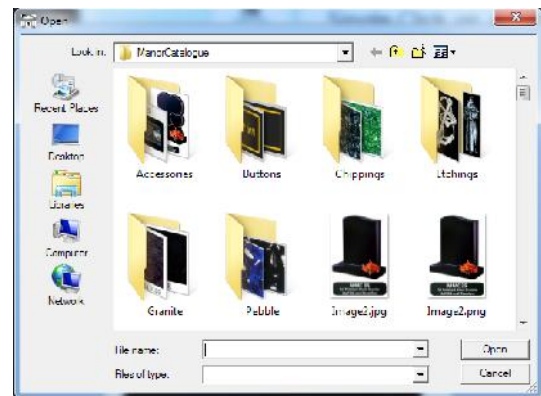
Summary Button

Displays a summary of the order

The summery form shows the client details as well as key costs for the order and the order totals (Exc., VAT and Total).

Hovering over some items will display additional information about them.

Summary Form Buttons

Print Button
Clicking the Print Button works the same way as the Order form Print Button (see 'What to Print" form on Page 29).

Exit Button
The exit button closes the Order Summary.