

WMS: Did You Know?

From Professor Merlot



How to view many Customers or Products at once?

Often it is necessary to review a number of similar items for updating. Seeing all of the items in one screen instead of flipping through the single view screen is quicker and more efficient.

Here's how:

1. Main Switchboard -> Purchasing Switchboard -> Products. This form is displayed as a "View as Form".

2. Notice the toolbar at the top of the form that shows "View as Spreadsheet" and "View as Form", "Sort Ascending" and "Sort Descending".

3. Currently the "View as Form" is depressed (this toggle button has two positions – In and Out).

4. Press the "View as Spreadsheet" button to change the view of all of the items as in a spreadsheet.

Product Name	Period	Supplier	Sales Category	Type	Product Number	Cost Price
1/2" Rocking tubes		LD Carlson	Equipment		4673	\$1.80
12" tubing		Crosby & B	Equipment		5606	\$3.50
12" Plastic Hydrometer jar		LD Carlson	Equipment		5396	\$1.90
26 bottle wine rack		Crosby & B	Wine Racks		8936b	\$1.00
3 gal Glass Carboys		Crosby & B	Containers		5271	\$7.15
375 ml clear Bellissima bottles		Crosby & B	Bottles & Closure		5836	\$11.95
375 ml flute alius bottles		Crosby & B	Bottles & Closure		5801	\$13.50
375ml clear semi-burgundy bottles		Crosby & B	Bottles & Closure		5803	\$11.95
375ml cobalt blue stretch hook		Crosby & B	Bottles & Closure		5850	\$13.75
375ml dark green Bellissima bottles		Crosby & B	Bottles & Closure		5834	\$15.00
375ml green semi-burgundy bottles		Crosby & B	Bottles & Closure		5802	\$11.95
375ml stretch hook frosted		Crosby & B	Bottles & Closure		5847	\$17.75
4th & Vine Labels (Cellar Casks) 8/32		4th and Vii	Labels		VA14007	\$3.40
4th & Vine labels (Italy Regions) 8/32		4th and Vii	Labels		VA14029	\$3.40
4th & Vine Labels (Bells&Bliss Black		4th and Vii	Labels		VA14074	\$3.40
4th & Vine Labels (Bow & Pine) 8/32		4th and Vii	Labels		VB14543	\$3.40
4th & Vine Labels (Bride/Groom gold Foil		4th and Vii	Labels		VA14071	\$4.25
4th & Vine labels (Bride/groom Silv Foil		4th and Vii	Labels		VA14072	\$4.25
4th & Vine Labels (Country Christmas) 8/		4th and Vii	Labels		VA14049	\$3.40
4th & Vine Labels (Fader) 8/32		4th and Vii	Labels		VA14005	\$4.25
4th & Vine Labels (plain) 8/32		4th and Vii	Labels		va14000	\$3.10
4th & Vine Labels (Plain) 8/32		4th and Vii	Labels		VA14500	\$3.10
4th & Vine Labels (plain) 8/32		4th and Vii	Labels		VA61000	\$3.10
4th & Vine Labels (plain) 8/48		4th and Vii	Labels		VA18000	\$3.10
4th & Vine Labels (plain) 8/48		4th and Vii	Labels		VA36000	\$3.10
4th & Vine Labels (Plain) 8/48		4th and Vii	Labels		VA72000	\$3.10
4th & Vine labels (Injain) 8/48		4th and Vii	Labels		v473000	\$3.10



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5. In the spreadsheet view, to make editing very simple: **Move one column closer to another column for easy reference and save scrolling!**

6. **Here's how** - move your mouse and click once on the Column Heading, **Unit Price**.

Product Name	Supplier	Product Number	Unit Price	Cost Price
Cabernet Sauvignon Cal Res 5wk	Cellar Craft	140154	\$101.00	\$45.95
Chardonnay Cal Res. 5wk	Cellar Craft	140484	\$101.00	\$43.95
Classic Port 6wk	Cellar Craft	108921	\$125.00	\$49.95
Merlot G Cuvee 6wk	Cellar Craft	108915	\$125.00	\$56.95
Pinot Grigio Italian 6wk	Cellar Craft	108944	\$125.00	\$57.95
Pinot Noir Cal Res 6 wk	Cellar Craft	108919	\$125.00	\$54.95
Rosso Fortissimo 6wk	Cellar Craft	108957	\$125.00	\$74.95

7. The result makes the entire column go black.

8. Position your mouse on the column heading, **Unit Price**, click once and **HOLD** the mouse button down.

9. Moving your mouse **Right to Left**, A narrow black column will appear.

Product Name	Supplier	Product Number	Unit Price	Cost Price
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Chardonnay Cal Res. 5wk	Cellar Craft	140484	\$101.00	\$43.95
Classic Port 6wk	Cellar Craft	108921	\$125.00	\$49.95
Merlot G Cuvee 6wk	Cellar Craft	108915	\$125.00	\$56.95
Pinot Grigio Italian 6wk	Cellar Craft	108944	\$125.00	\$57.95
Pinot Noir Cal Res 6 wk	Cellar Craft	108919	\$125.00	\$54.95
Rosso Fortissimo 6wk	Cellar Craft	108957	\$125.00	\$74.95

10. Move your mouse pointer until the **Narrow Black Column** is next to the **Product Name** column.

11. **Release the button** and the **Unit Price** column will now have moved to the right of the **Product Name** column.

Product Name	Unit Price	Supplier	Product Number	Cost Price
Cabernet Sauvignon Cal Res 5wk	\$101.00	Cellar Craft	140154	\$45.95
Chardonnay Cal Res. 5wk	\$101.00	Cellar Craft	140484	\$43.95
Classic Port 6wk	\$125.00	Cellar Craft	108921	\$49.95
Merlot G Cuvee 6wk	\$125.00	Cellar Craft	108915	\$56.95
Pinot Grigio Italian 6wk	\$125.00	Cellar Craft	108944	\$57.95
Pinot Noir Cal Res 6 wk	\$125.00	Cellar Craft	108919	\$54.95
Rosso Fortissimo 6wk	\$125.00	Cellar Craft	108957	\$74.95

12. This configuration of the columns should make data entry much quicker with the name and the price next to each other.

