

# WMS: Did You Know?

## From Professor Merlot



### Why do you have Function Keys (ver 7.78)?

One of the best tools in WMS has been the addition of the Function Keys. Available with each installation is a shortcut Function Key card strip that sits at the top of your keyboard or monitor. Designed to ensure you can make quick access to the major features of WMS, these shortcuts are a valuable tool to use.

#### Here's how:

All of the function keys are accessible **at any time while in WMS**. The functions that are available:

- **F4 – Lock Current Invoice.** Use this form lock the current invoice on the screen.
- **F4 – Lock Current Purchase Order.** Use this form lock the current Purchase Order on the screen.
- **Ctrl-F4 – Lock/Unlock all Invoices.** Use this form lock (or unlock) all of the invoices at once. This may be a useful tool for auditing customer's transactions.
- **F5 – the Appointment Scheduler.** Use this form to schedule appointments for your customer's wines to be bottled.
- **Ctrl-F5 – the Brew Scheduler.** Use this form to schedule appointments for your customer's wines that are yet to be invoiced. Invoices may be assigned at a later date. (Enhancement)
- **Shft-F5 – the Block Appointment Scheduler.** Use this form to schedule appointments other than Invoice items, that is, Dentist Appointments, or Holidays etc. These entries show up in the Appointment Scheduler to indicate miscellaneous items.
- **F6 – the Select Production Checklists form.** Entering and printing selections on this form provides you with the entire checklist you require for your day's work. The reports generated from this form display the entire tasks required on one (or two) sheets of paper.
- **Ctrl-F6 – the Wine Ready Contact List** is used to display customer's wine that have been filtered but not bottled. This form is used to contact customers, set up appointments to bottle and track the contact information.
- **Shft-F6 – the Wines To Make form** is shown and allows editing of all wines that are not Made (Primary stage). As well, the production Label can be printed from this form as well as assigning a Bin number and resetting the start date for the wine.
- **F7 – the Invoice.** Use this form to create a Point of Sale order for your customer who is selecting a wine or beer to be made on premise or for a retail purchase.
- **Shft-F7 – the Reminders form.** This form can be configured (in the Preferences form) to pop up at the start of the daily opening of WMS. The primary function is to bring to attention any items that can be passed to the next day's business operation.
- **F8 – the Customer Find by Name form.** This is perhaps one of the most useful function keys in that it allows you to jump immediately to any **Invoice** once you have selected a customer's name. The form displays **all of this customer's Invoices** with a **Press-to-go-to** button next to each **Invoice number**.



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- **Ctrl-F8** – the **Customer Find by Phone** form. This form is similar in design to the F8 function key with the same functions. You may enter either with the Area Code or without the Area Code. The “dash (-)” between the numbers is required. This key is useful in determining a customer’s name by only knowing their phone number. Handy if you cannot remember their name.
- **Shft-F8** – the **Set Employee** form. This form allows you to change the login name of the current employee in WMS.
- **F9** – the **Open Outlook** button. Should you have MS Office Outlook installed, this form is a quick jump to open MS Outlook. A pre-formatted email using your business parameters from the Preferences form is added as default entries for this email message sent to WMS support, simply fill the body of the email and press Send.
- **Ctrl-F9** – a shortcut to open the web site, [www.wms4wine.com](http://www.wms4wine.com).
- **Shft-F9** – a shortcut to open the web site, [www.brewcheck.com](http://www.brewcheck.com).
- **F10** – the **Quote** form. Use this form to create an estimate of an order for a walk-in customer interested in your costs for a specific wine or beer. This report, when printed looks very similar to the regular invoice, but has the word “Quote” printed in the background of the paper copy.
- **Ctrl-F10** – the **Calculator** form is the standard Windows calculator.
- **Shft-F10** – the **Frequently Asked Questions** form. This is useful for source for answering questions about WMS processes.
- **F11** – **System Checkup**. This action will do a check up on the data stored in WMS. It finds any values that are missing or empty and corrects them. For all those entries corrected in the Customer Information and Products forms, their Status is marked as “Changed” and the Status Date is changed to the current date.
- **Ctrl-F11** – the **Production Master** form. This form displays all of the products in production that have not yet been bottled. Included in the display is the number of days for each product to be completed. Reports included are details and various sorts.
- **F12** – the **Error Messages** form. This is only used when an error message is displayed while using WMS. If an error occurs, press F12, write down the details of the message and pass this information onto WMS Technical Support, for analysis.

