

## Production/Client Order on Hold Feature

Production and Client Orders in OPTO may be placed on hold – this will remove the allocation of materials and will stop the order from being despatched. The Employee will require permission and an internal employee password set-up in their employee record. (see below)

From the OPTO ribbon, select the 'Resources' tab and **click** on the 'New/Edit Employee' icon to open the 'Employee Details' window. Enter a password in the **Password** field then select the 'Security' tab and click in the **ON-HOLD (Clt)** and the **ON-HOLD (Prd)** boxes to tick (circled below).

Employee Details window (Details tab):

Emp No: 1 | Employee Name or Surname: JONES | Given Name: Robert | Middle Name: B | Initial: | Current Shift: Shift 1

Group Pos: 10 | ADMINISTRATION

Emp Start Date: 26/02/10 | 10037 | Sales Team: |

Position: 1001 | Managing Director

Acting Position: |

**Password: ●●** | Div: 1 | COMPANY ONE

Is Active:  Yes

Lunch - Auto:  Yes

Smoko - Auto:  Yes

Multi On Only / Multi On & Off:  Yes

Rounding:  Yes

Round 15 Min: > 10 15 <

Web Despatch:  Yes

N	Day	<<<	Early Start	Std Start	Std Finish	Late Finish	>>>	Break	Norm Time	Over Time
1	MONDAY	5	00:00:00	07:00:00	15:06:00	00:00:00	5	.50	7.60	3.00
2	TUESDAY	5	00:00:00	07:00:00	15:06:00	00:00:00	5	.50	7.60	3.00
3	WEDNESDAY	5	00:00:00	07:00:00	15:06:00	00:00:00	5	.50	7.60	3.00
4	THURSDAY	5	00:00:00	07:00:00	15:06:00	00:00:00	5	.50	7.60	3.00
5	FRIDAY	5	00:00:00	07:00:00	15:06:00	00:00:00	5	.50	7.60	3.00
6	SATURDAY	0	00:00:00	00:00:00	00:00:00	00:00:00	0	.00	.00	.00
7	SUNDAY	0	00:00:00	00:00:00	00:00:00	00:00:00	0	.00	.00	.00

Address: 1 Bellbird Court, Mt Cotton, QLD. 4165

Other Details: Email Office: rjones@itmsystems.com.au

SMTP PW: |

Email Private: |

Phone No: 3300 6368 | Mobile No: 0417 075 152

Employee Details window (Security tab):

Emp No: 1 | Employee Name or Surname: JONES | Given Name: Robert | Middle Name: B | Initial: | Current Shift: Shift 1

Security options:

- Signature Purchase
- Change Client Code
- Change Supplier Code
- Show Financial History (Clients)
- Show Financial History (Suppliers)
- [3] Hide Despatch Amount
- Change Part Code
- Delete Parts
- Change Parts Stock
- Create New Part Code
- Create New Material Code
- Password Despatch (Production)
- Password Despatch (Client Order)
- Password Material Delivery
- Update - Parts (Utility)
- Update - Material (Utility)
- Add NCR or ECR
- QA - NCR/ECR (Complete)
- [3] Quote Fast Markup (Override)
- Release Client Orders
- Check - Clock Time
- Check - Jobs
- Despatch Awaitin;  Add Transport
- Change Revision Tick in Parts
- Change Material Code
- Delete Material
- Change Material Stock
- Lock/Unlock Parts for Editing
- Save Changes to Locked Parts
- Substitute Items
- Update Parts Cost Price
- Allow Part Sell Price change (setup Param Client)
- Show Supplier Total
- Show Client Total  Show Pick Date (Clf Callup)
- [3] Show Order/Invoice Total, plus Cost
- Use Div for selected Reports
- Point Of Sale Access
- Change Due Date in Order Book
- Purchase Restrict
- Stock Take Restrict
- Send Production Order -> History
- Back from History <- Production Order
- Cancel - Production Order
- Send Client Order -> History
- Back from History <- Client Order
- [3] Credit Orders and Purchase, Orders Only
- Cancel - Client Order  Return Goods
- Create Invoice  Change Credit, Desp Stop
- Show Job Cost Screen
- Edit History Order Book
- Change Part Production Stop
- Show All Doc's (Incl. - No Public Access)

Emp Cost: \$ / Min .6666 | \$ / Hr 40.00

Supervising: .0000 | .00

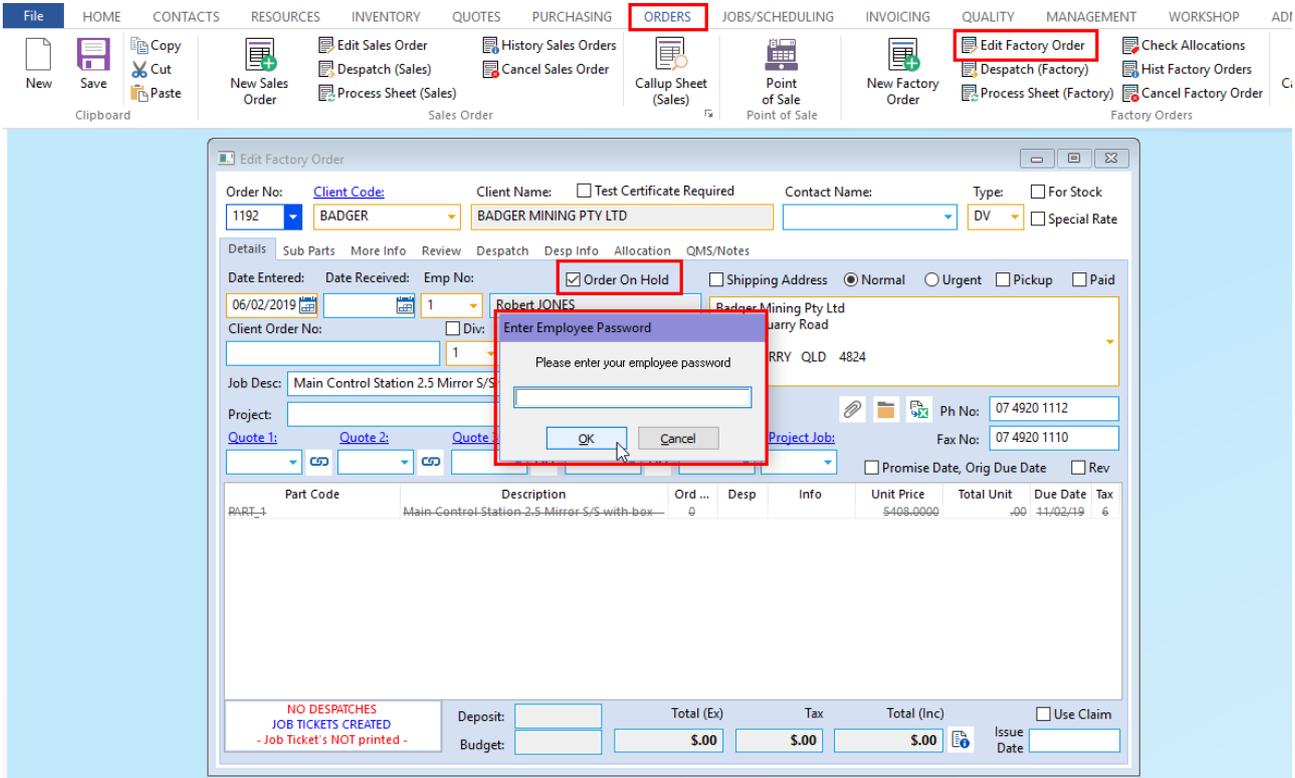
Charge: 1.0000 | 60.00

Rating: 1 | Qualifications apply

Budget: |

## To Place a Production Order On-Hold

From the OPTO ribbon, select the 'Orders' tab and **click** on the 'Edit Factory Order' icon (1). In the **Order No** field **press** **<F2>** and select the order from the pop-up list then **click** on **OK**. **Press <TAB>** to generate the window, **click** on the 'Despatch' tab and **click** in the 'Order on Hold' box to tick (2). Enter the internal employee password, **click** on the **OK** button, and **press <F9>** to save.



## To Place a Client Order On-Hold

From the OPTO ribbon, select the 'Orders' tab and **click** on the 'Edit Sales Order' icon (1). In the **Order No** field **press** <F2> and select the order from the pop-up list then **click** on **OK**. **Press** <TAB> to generate the window, ensure to **click** in the **OnHold** box to tick (2) then **press** <F9> to save.

The screenshot shows the 'Edit Sales Order' window. The ribbon at the top has 'ORDERS' selected. The 'Edit Sales Order' icon is highlighted. The window displays the following information:

- Order No: 50151, Client Name: BADGER MINING PTY LTD
- Date Entered: 04/04/2018, Emp No: 1, Robert JONES
- Client Order No: 5423, Div: 1, Sales ID: 2
- Job Desc: The Fantastic Assembly
- Quote 1: [blank], Quote 2: [blank], Purch: [blank]
- Summary: NO DESPATCHES, Balance \$16,305, Line: 1, Items: 1, Excl TAX: \$400.00, TAX: \$40.00, Incl TAX: \$440.00

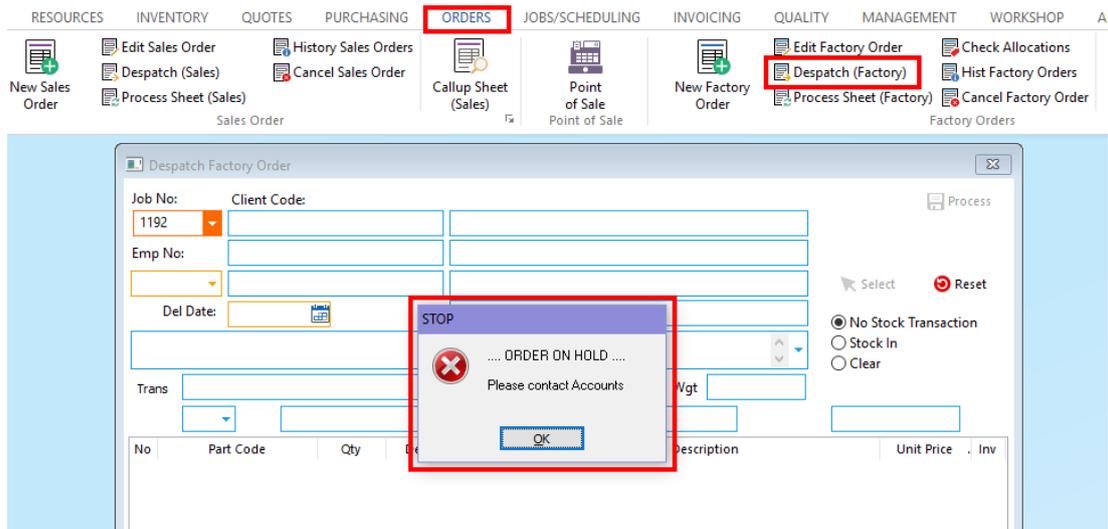
The message pane on the 'Details' tab of the orders alerts USERS that the order is on hold. (See below)

The screenshot shows the 'Edit Factory Order' window. The 'Order On Hold' checkbox is checked. The message pane at the bottom left contains the text: "FULLY DESPATCHED JOB TICKETS CREATED -- Order ON HOLD --". The summary table at the bottom shows:

Part Code	Description	Ord ...	Desp	Info	Unit Price	Total Unit	Due Date	Tax
PART_1	Main Control Station 2.5 Mirror S/S with box - MEDECO	0			\$408.0000	.00	11/02/19	6

Summary: Deposit: [blank], Budget: [blank], Total (Ex): \$0.00, Tax: \$0.00, Total (Inc): \$0.00

The Order cannot be despatched while it is On Hold.



### To Remove the On-Hold Feature on a Production Order

From the OPTO ribbon, select the 'Orders' tab and **click** on 'Edit Sales Order' or 'Edit Factory Order' then **click** in the **OnHold** box (Sales Order) or the **Order On Hold** box (Factory Order) to un-tick. Enter the internal employee password where required then **click** on OK and **press <F9>** to save. USERS can now despatch the orders as normal.