## View, Add or Edit NCR/ECR (QMS) Records from other Windows

#### **Overview:**

Quality Assurance/NCR/ECR records can be viewed, created and/or edited from the following windows-

- Client Details
- Supplier Details
- Employee Details

All the QMS NCR/ECR records relating to any of these entities are listed on the relevant 'QMS' tab. This tab is always the last tab to the right of the main window. To access the 'QMS' tab, open the appropriate window as pictured below and **click** the 'QMS' tab (circled below).

|                          |  | Employee             |   |                    |  |  |  |  |  |  |
|--------------------------|--|----------------------|---|--------------------|--|--|--|--|--|--|
| Emp No: Employee N       | lame or Surname:                             | Given Name:          | Middle Name: Initial                                    | : Current Shift: 🖉 |  |  |  |  |  |  |
| 1 JONES                  |  | Robert               | В   | Shift 1 👻 1        |  |  |  |  |  |  |
| Details More Info Securi | ty Emp Sched Pictures N                      | ote                  |   |                    |  |  |  |  |  |  |
| 🚜 Cat: <any></any>       | 👻 Sub Cat                                    | <any></any>          | - Comp:   | 🗸 🔎 Search 🎯 🖶     |  |  |  |  |  |  |
| QA/NCR:                  |  |                      |   |                    |  |  |  |  |  |  |
| Track 🔻 Date             | Category Sub-Cat                             | egory Emp            | QA Info   | Comp               |  |  |  |  |  |  |
|                          |  |                      |   |                    |  |  |  |  |  |  |
|                          | Clients - A                                  | A-Z Stationery Su    | oplies  |                    |  |  |  |  |  |  |
| Client Code:             | Client Code: Client Name: Part Prefix: Tax C |                      |   |                    |  |  |  |  |  |  |
| A-Z                      | A-Z V A-Z Stationery Supplies                |                      |   |                    |  |  |  |  |  |  |
| Details Delivery Info Cl | ient Info More Info Ord                      | ers Jobs Quotes F    | arts Invoices Financial Hist                            | t Notes QMS        |  |  |  |  |  |  |
| Category: <any></any>    | ✓ Sub C                                      | ategory: <any></any> | - Comp: <ar< td=""><td>iy&gt; 🗸 🔎 Search 🕝 🚔</td></ar<> | iy> 🗸 🔎 Search 🕝 🚔 |  |  |  |  |  |  |
| QA/NCR:                  |  |                      |   |                    |  |  |  |  |  |  |
| Track 🔻 Date             | Category Sub-                                | Category Emp         | QA Info   | Comp               |  |  |  |  |  |  |
|                          |  |                      |   |                    |  |  |  |  |  |  |
|                          | Supplier -                                   | Bob's Bearing Su     | pplies  | - • •              |  |  |  |  |  |  |
| Supplier Code:           | Supplier Name:                               |                      |   | Tax Code: 🖉        |  |  |  |  |  |  |
| BOBBEAR                  | <ul> <li>Bob's Bearing Su</li> </ul>         | pplies               |   | 6 🔻 GST            |  |  |  |  |  |  |
| Details Supplier Info M  | ore Info Purchases Deli                      | very Materials Fina  | ncial Hist Note QMS                                     |                    |  |  |  |  |  |  |
|                          |  |                      |   |                    |  |  |  |  |  |  |
| 🚜 Cat: <any></any>       | ✓ Sub €                                      | Cat: <any></any>     | - Comp: <ar< td=""><td>ny&gt; 🚽 🔎 Search 🕝 🖶</td></ar<> | ny> 🚽 🔎 Search 🕝 🖶 |  |  |  |  |  |  |
| QA created for this Supp | olier (4)                                    |                      |   |                    |  |  |  |  |  |  |
| Trac 🔻 Date              | Category Sub                                 | -Category Emp        | QA Info   | Comp               |  |  |  |  |  |  |
| 1 2 16/04/1              | 0 301 301-6                                  | 4 Part               | does not fit into assembly                              | Yes                |  |  |  |  |  |  |

## For this Example, the 'Client' has been Selected

#### **To Access These Records**

From the OPTO ribbon, select the 'Contacts' tab and **click** on the 'New/Edit Clients' icon to open the 'Clients' window.



In the 'Clients' window select the **Code** field and **press** <**F2**> then select the client from the pop-up list and **click** <u>OK</u>. **Click** on the 'QMS' tab, all the QA/QMS records in relation to that client are displayed on this tab.

## To Create a New NCR/ECR (QA) Record in Relation to the Client

**Click** on the 'Add QMS' button (circled below).

| lient Code:        |           | Client Name:  |               |             |              | Part Prefix          | Tax Code |     |    |
|--------------------|-----------|---------------|---------------|-------------|--------------|----------------------|----------|-----|----|
| 4-Z                | *         | A-Z Statione  | ery Supplies  |             |              |                      | 1 👻      | GST |    |
| etails Delivery In | fo Client | Info More Inf | o Orders Jobs | Quotes Pa   | rts Invoices | Financial Hist Notes | QMS      |     |    |
| Category:          | Any>      | •             | Sub Category: | <any></any> | •            | Comp: <any> -</any>  | 🔎 Search | G   | ę  |
| Add QMS            | Date      | Category      | Sub-Category  | Emp         |              | QA Info              |          | с   | om |

#### **To View/Edit Existing Records**

**Dbl-click** on the required tracking number of a NCR/ECR (QA) to open the selected record. To view records by a Category, Sub-Category or Complete, select options from the drop menus and **click** on the 'Refresh' button.

|       |             |             | CI                             | ients - Bad  | ger Mining Pty Ltd    |                                | • 💌   |
|-------|-------------|-------------|--------------------------------|--------------|-----------------------|--------------------------------|-------|
| Clien | Code:       |             | Client Name                    | e:           |                       | Part Prefix: Tax Code:         | Ø     |
| BAD   | GER         |             | <ul> <li>Badger Mir</li> </ul> | ning Pty Ltd |                       | BAD Refresh                    | Print |
| Detai | ls Delivery | Info Clie   | nt Info More Ir                | nfo Orders   | Jobs Quotes Parts Inv | oices Financial Hist Notes     |       |
|       | Category:   | <any></any> | •                              | Sub Categ    | ory: <any></any>      | Comp: <ang> D Search</ang>     | 6     |
| QA/N  | ICR:        |             | -                              |              |                       |                                |       |
|       | Track 🔻     | Date        | Category                       | Sub-Cat      |                       | QA Info                        | Comp  |
| 1     | 10          | 29/09/10    | 301                            | 301-1        | Drondown Menus        | ements not as per instructions | No    |
| 2     | 12          | 03/11/10    | 102                            | 102-1        | Dropuown menus        | foolbox is faulty              | Yes   |
| 3     | 14          | 08/11/10    | 301                            | 301-4        |                       | Toolbox is Faulty              | Yes   |

To print a list of the records displayed on this tab, **click** on the 'Print' button to open the 'Print Table Data' window, select or de-select to show or hide columns and then **click** on 'Preview' to view and/or print the report. For a full explanation of the printing function, please see *Print Data Table Window*.

# **To Search Records**

The 'Search' button (circled below) is used to search all records in the tab by a key word(s).

|       |  |             |         | Clie       | nts - Badger    | Mining Pty L | td          |             |                | -          | • ×  |
|-------|--|-------------|---------|------------|-----------------|--------------|-------------|-------------|----------------|------------|------|
| Clien | t Code:                                |             | CI      | ient Name: |                 |              |             |             | Part Prefix    | a Tax Code | . 0  |
| BAD   | DGER 👻 Badger Mining Pty Ltd BAD 1 👻 G |             |         |            |                 |              |             |             |                | GST        |      |
| Deta  | ils Delivery                           | Info Clie   | nt Info | More Info  | Orders Jobs     | Quotes Part  | s Invoices  | Financial   | Hist Notes     | QMS        |      |
|       | Category:                              | <any></any> |         | •          | Sub Category:   | <any></any>  |             | Comp:       | <any> 👻</any>  | 🔎 Search   | G 🖶  |
| QA/I  | NCR:                                   |             |         |            |                 |              |             |             | 3              | Sea        | arch |
|       | Track 🔻                                | Date        | C       | ategory    | Sub-Category    | Emp          |             | QA I        | nfo            | _          | Comp |
| 1     | 10                                     | 29/09/10    | 301     |            | 301-1           | 17 Toolbox   | x measureme | nts not as  | per instructio | ns         | No   |
| 2     | 12                                     | 03/11/10    | 102     |            |                 | P1 - 4       |             | ×           |                |            | Yes  |
| 3     | 14                                     | 08/11/10    | 301     |            |                 | Find         |             |             |                |            | Yes  |
| 4     | 19                                     | 09/11/10    | 401     |            |                 |              |             |             | / Steel        |            | No   |
| 5     | 21                                     | 10/11/10    | -       | Find what: |                 |              | Ei          | nd Next     |                |            | No   |
| 6     | 24                                     | 11/11/10    | 301     |            |                 | Direction    |             |             |                |            | Yes  |
| 7     | 27                                     | 18/11/10    | 301     | Match.     | whole word only | Direction    | N           | 1ark All    | ils            |            | No   |
| 8     | 28                                     | 10/03/11    | 301     | Match      | case            | QUp          |             |             |                |            | No   |
| 9     | 31                                     | 19/10/11    | 102     |            | 1               | Down         |             | Cancel      |                |            | No   |
| 10    | 33                                     | 11/05/12    | 301     |            |                 |              |             |             |                |            | Yes  |
| 11    | 35                                     | 22/02/13    | 100     |            | 100-1           | 6 jtedikh    | gviugyuhpre | gupeqr9     | _              |            | Yes  |
| 12    | 6                                      | 27/04/10    | 301     |            | 301-7           | 4 Keener     | Plates were | nut as rour | d dicr inctear | of ovals   | Vac  |

Ensure to **press** <**F9**> after editing to save any changes.