

# Best Practices

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Tips to Navigate Transactions in cERP to save time & gain efficiency

contract  ERP  
a COMPUSOFT product

contract ERP  
a COMPUSOFT product

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# Agenda

**Status Boards**

**Navigate &  
Contract Close Out**

**User Interface**

**Sort & Filter Lists**

**Dates, Dates & Dates**



# Status Boards

Sales Status ✓ Saved

Search **New** Process Alerts & Review More options

New Sales Order New Sales Quote Customer Card

Document Type: Order | Document No.: ... | Contract No.: | Sell-to Customer No.: | Salesperson Code: | Location Code: CT | Shipping Status: | Requested Date: | Shipment Date: | Sales Quote No.: | Filter Out Completed:

Alerts	Ship... Status	Release...	No. ↓	Sell-to Customer No.	Sell-to Customer Name	Location Code	Delivery Zone Code	Customer PO No.	Job Name	Order Date	Requested Date	Dep... Sati...	Amount Including Tax	Sales... Code	Picking Status
⚠	●	🔒	SO-001522	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			4/26/2022	5/10/2022	<input type="checkbox"/>	11,725.28	BN	NOT RELEA...
⚠	●	🔒	SO-001512	FSC-001	Farmingdale State College	CT				3/25/2022		<input type="checkbox"/>	259.50	BN	NOT RELEA...
→ ⚠	⋮ ●	🔒	SO-001511	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			3/25/2022	3/25/2022	<input checked="" type="checkbox"/>	760.38	BN	NOT RELEA...
	●	🔒	SO-001504	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			2/28/2022		<input type="checkbox"/>	0.00	BN	NOT RELEA...
	●	🔒	SO-001477	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	123		10/12/2021	10/19/2021	<input type="checkbox"/>	0.00	RS	NOT RELEA...
	●		SO-001475	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	23542	SO Deposit example	5/24/2022	5/31/2022	<input checked="" type="checkbox"/>	375.84	RS	NOT RELEA...

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Lines | Manage | More options

Alerts	Shipping Status	Type	No.	Description	Quantity	Qty. on P.O.	Assoc. Qty. on Hand	Quantity Shipped	Outstanding Quantity	Quantity Invoiced	Qty. Remaining to Invoice	Unit Price Excl. Tax	Amount Including Tax	Requested Date
⚠	●	Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	0	0	1	0	1	201.57	218.96	3/25/2022
	●	Item	NSCL	1250.CUSH.690	1	0	1	0	1	0	1	157.39	170.96	3/25/2022
	●	Item	NSHI	A955 5" x 4-1/2" S2	1	1	0	0	1	0	1	119.33	129.62	3/25/2022
→	⋮ ●	Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	1,000	0	1	0	1	221.73	240.84	3/25/2022

## Overview

- View header/lines with efficiency
- Quickly review/update Documents
- Used by multiple roles for different purposes. Including:
  - Warehouse
  - PM/Sales
  - Ops Mgr
  - Sales Mgr/GM
  - Purchasing
  - Billing

# Sales Status Board for Warehouse

Sales Status ✓ Saved

Search [New](#) Process Alerts & Review More options

[New Sales Order](#) [New Sales Quote](#) [Customer Card](#)

Document Type: Order | Document No.: ... | Contract No.: | Sell-to Customer No.: | Salesperson Code: | Location Code: CT | Shipping Status: | Requested Date: | Shipment Date: | Sales Quote No.: | Filter Out Completed:

Alerts	Ship... Status	Release...	No. ↓	Sell-to Customer No.	Sell-to Customer Name	Location Code	Delivery Zone Code	Customer PO No.	Job Name	Order Date	Requested Date	Dep... Sati...	Amount Including Tax	Sales... Code	Picking Status
⚠	●	🔒	SO-001522	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			4/26/2022	5/10/2022	<input type="checkbox"/>	11,725.28	BN	NOT RELEA...
⚠	●	🔒	SO-001512	FSC-001	Farmingdale State College	CT				3/25/2022		<input type="checkbox"/>	259.50	BN	NOT RELEA...
→ ⚠	●	🔒	SO-001511	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			3/25/2022	3/25/2022	<input checked="" type="checkbox"/>	760.38	BN	NOT RELEA...
	●	🔒	SO-001504	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			2/28/2022		<input type="checkbox"/>	0.00	BN	NOT RELEA...
	●	🔒	SO-001477	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	123		10/12/2021	10/19/2021	<input type="checkbox"/>	0.00	RS	NOT RELEA...
	●	🔒	SO-001475	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	23542	SO Deposit example	5/24/2022	5/31/2022	<input checked="" type="checkbox"/>	375.84	RS	NOT RELEA...

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Lines | Manage | More options

Alerts	Shipping Status	Type	No.	Description	Quantity	Qty. on P.O.	Assoc. Qty. on Hand	Quantity Shipped	Outstanding Quantity	Quantity Invoiced	Qty. Remaining to Invoice	Unit Price Excl. Tax	Amount Including Tax	Requested Date
⚠	●	Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	0	0	1	0	1	201.57	218.96	3/25/2022
	●	Item	NSCL	1250.CUSH.690	1	0	1	0	1	0	1	157.39	170.96	3/25/2022
	●	Item	NSHI	A955 5" x 4-1/2" S2	1	1	0	0	1	0	1	119.33	129.62	3/25/2022
→	⋮	Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	1,000	0	1	0	1	221.73	240.84	3/25/2022

## Filter on Shipping Status:

- Ready & Requested Del. Date < a few days out  
= Ready to rock & roll!
- Partial & Requested Del. Date < a few days out  
= Need Purchasing or Sales to review
- Not Ready & Requested Del. Date < a few days out  
= Need Purchasing or Sales to review

# Sales Status Board for PM/Sales

Search [New](#) Process Alerts & Review More options

[New Sales Order](#) [New Sales Quote](#) [Customer Card](#)

Document Type	Document No.	Contract No.	Sell-to Customer No.	Salesperson Code	Location Code	Shipping Status	Requested Date	Shipment Date
Order	...				CT			

Alerts	Ship... Status	Release...	No. ↓	Sell-to Customer No.	Sell-to Customer Name	Location Code	Delivery Zone Code	Customer PO No.	Job Name	Order Date	Requested Date
▲	●	🔒	SO-001522	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			4/26/2022	5/10/2022
▲	●	🔒	SO-001512	FSC-001	Farmingdale State College	CT				3/25/2022	
→ ▲	⋮ ●	🔒	SO-001511	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			3/25/2022	3/25/2022
			SO-001504	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			2/28/2022	
	●	🔒	SO-001477	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	123		10/12/2021	10/19/2021
	●		SO-001475	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	23542	SO Deposit example	5/24/2022	5/31/2022

Lines | Manage More options

Alerts	Shipping Status	Type	No.	Description	Quantity	Qty. on P.O.	Assoc. Qty. on Hand	Quantity Shipped	Outstanding Quantity	Quantity Invoiced	Qty. Remaining to Invoice
▲	●	Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	0	0	1	0	1
	●	Item	NSCL	1250.CUSH.690	1	0	1	0	1	0	1
	●	Item	NSHI	A955 5" x 4-1/2" S2	1	1	0	0	1	0	1
→	⋮ ●	Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	1,000	0	1	0	1

## Filter on Shipping Status:

- Partial & Requested Del. Date < a few days out  
= Need to review

- Not Ready & Requested Del. Date < a few days out  
= Need to review

## Filter on Req Del Date:

- < today  
= Need to review/update due date

## Review Alerts

# Sales Status Board for Management

Sales Status

Search [New](#) Process Alerts & Review More options

[New Sales Order](#) [New Sales Quote](#) [Customer Card](#)

Document Type: Order | Document No.: ... | Contract No.: | Sell-to Customer No.: | Salesperson Code: | Location Code: CT | Shipping Status: | Requested Date: | Shipment Date: | Sales Quote No.: | Filter Out Completed:

Alerts	Ship... Status	Release...	No. ↓	Sell-to Customer No.	Sell-to Customer Name	Location Code	Delivery Zone Code	Customer PO No.	Job Name	Order Date	Requested Date	Dep... Sati...	Amount Including Tax	Sales... Code	Picking Status
			SO-001522	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			4/26/2022	5/10/2022	<input type="checkbox"/>	11,725.28	BN	NOT RELEA...
			SO-001512	FSC-001	Farmingdale State College	CT				3/25/2022		<input type="checkbox"/>	259.50	BN	NOT RELEA...
			SO-001511	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			3/25/2022	3/25/2022	<input checked="" type="checkbox"/>	760.38	BN	NOT RELEA...
			SO-001504	BASHCO	BAY SHORE CONSTRUCTION	CT	NY			2/28/2022		<input type="checkbox"/>	0.00	BN	NOT RELEA...
			SO-001477	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	123		10/12/2021	10/19/2021	<input type="checkbox"/>	0.00	RS	NOT RELEA...
			SO-001475	BASHCO	BAY SHORE CONSTRUCTION	CT	NY	23542	SO Deposit example	5/24/2022	5/31/2022	<input checked="" type="checkbox"/>	375.84	RS	NOT RELEA...

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Lines | Manage | More options

Alerts	Shipping Status	Type	No.	Description	Quantity	Qty. on P.O.	Assoc. Qty. on Hand	Quantity Shipped	Outstanding Quantity	Quantity Invoiced	Qty. Remaining to Invoice	Unit Price Excl. Tax	Amount Including Tax	Requested Date
		Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	0	0	1	0	1	201.57	218.96	3/25/2022
		Item	NSCL	1250.CUSH.690	1	0	1	0	1	0	1	157.39	170.96	3/25/2022
		Item	NSHL	A955 5" x 4-1/2" S2	1	1	0	0	1	0	1	119.33	129.62	3/25/2022
		Item	LCN10015	CLOSER LCN - 1460 CUSH BR...	1	0	1,000	0	1	0	1	221.73	240.84	3/25/2022

Filter on Req Delivery Date:

- " (blank)  
= Sales/PM need to review/update due date
- < today  
= Sales/PM need to review/update due date

# Purchase Status Board

Purchase Status

Search Edit List Process Report Alerts More options

Document Type Document No. Location Code Vendor No. Expected Receipt Date Promise Date Buyer

Order

Alerts	Released/Open	No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Order Date	Expected Receipt Date	Purchaser Code	Vendor Order No.	Vendor Invoice No.	Loc Co
→ -	⋮	PO002042	LCNCLO	LCN	10/7/2021	10/7/2021	AG		545	CT
		PO002117	ABFRSY	ABF FREIGHT SYSTEM INC.	1/7/2022		BN			CT
		PO002169	HAGER	HAGER INDUSTRIES	3/25/2022	3/25/2022	BN			CT

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Lines

Alerts	Type	No.	Description	Description 2	Purchasing Code	Item Category Code	Product Group Code	Quantity	Qty. to Receive	Quantity Received	Direct Unit Excl. Tax	Line Amount Excl. Tax	Quantity Invoiced	Promised Receipt Date
→ -	⋮ Item	NSCL	=	zsdofg:	SPECIAL	HARDWA...	CL	1	0	1	50.00	50.00	0	10/8/202

## Filter on Completely Received No:

- Promised Date < a few days out  
= Material due to arrive soon
- Promised Date < today  
= Material is late; contact vendor
- Promised Date " (blank)  
= Not confirmed; contact vendor if needed (also shows in cue)

## Filter on Vendor:

- Quickly work open PO's for a given vendor

## Review Alerts

# Shop & Work Order Status Boards

Shop Order Status

Search + New Manage Process Report Alerts More options

Shop Order No. Start By Date Due Date Location Filter Contract No. Shop Manager Finish Status Status Project Manager

Alerts	Ready To Finish	No. ↑	Contract No.	Contract Description	Status	Sales Order No.	Start By Date	Due Date	Quantity	Qty. Remain...	Qty. to Finish	Location Code	Project Manager Code	Qty. Scann
→	●		SHOP000363 JOB000676	FINAL TEST FOR DHI PREP	In Process		10/22/2021	11/1/2021	35.00	35.00	0.00	LI	KS	35
⚠	●		SHOP000364 JOB000684	MM DEMO JJAS	Open		11/18/2021	12/16/2021	1.00	1.00	0.00	NY	MM	0
	●		SHOP000366 JOB000687	MM DEMO S&S	In Process		11/16/2021	12/14/2021	1.00	1.00	0.00	NY	BN	0
	●		SHOP000367 JOB000687	MM DEMO S&S	Open		12/10/2021	12/14/2021	33.00	33.00	0.00	NY	BN	0
	●		SHOP000368 JOB000689	St. John's Hospital - Childrens Cen...	Open		2/14/2022	2/16/2022	15.00	15.00	0.00	NY	MM	0
	●		SHOP000369 JOB000662	KENS TEST FOR BC18 DHI	Open			11/19/2021	14.00	14.00	0.00	NY	KS	0
	●		SHOP000370 JOB000665	St. John's Hospital - DHI WMS Job...	Open			11/19/2021	15.00	15.00	0.00	LI	KS	0

Lines Manage Line Fewer options

Alerts	Ready To Finish	Line No. ↑	Item No.	Desc.	Description 2	Quantity	Start By Date	Due Date	Qty. to Finish	Qty. Finished	Qty. Remaining	Contract No.	Change Order No.	Material Entry No.	Ass Do Typ
→	●	10000	NSHMF3SF	STE SGL HMF 3-0 x 7-0 R...		1	10/28/2021	11/1/2021	0	0	1	JOB000676	0	10000	Co
	●	20000	NSHMF3SF	STE SGL HMF 3-6 x 7-0 R...		1	10/28/2021	11/1/2021	0	0	1	JOB000676	0	30000	Co
	●	30000	NSHMF3SF	STE SGL HMF 3-0 x 7-0 LH...		1	10/28/2021	11/1/2021	0	0	1	JOB000676	0	50000	Co
	●	40000	NSHMF3SF	STE SGL HMF 2-8 x 7-0 LH...		1		11/1/2021	0	0	1	JOB000676	0	70000	Co

## Filter on Finish Status:

- Ready & Due Date  
= Material that can be shop built
- Partially Ready/Not Ready & Due Date < a few days out  
= Material that is due but not ready
- Promised Date " (blank)  
= Not confirmed; contact vendor if needed (also shows in cue)

## Sort/Filter on Qty Remaining:

- Plan for larger jobs requiring more labor

## Review Alerts

## Visual Indicator for Ready to Finish Status



# Release Schedule Status Board

Release Schedule Status ✓ Saved

Search **Details** | Navigate | Process | Report & Alerts | More options

Comments | **Unscheduled Lines** | Line Details | Material List | Services | Assignments | Contract | Release Schedule

Contract No. | Release No. | Due Date | Sell-to Customer No. | Salesperson | Project Manager | Filter Out Completed

Alerts	Overall Status	Contract No. ↑	Contract Job Name	Release No. ↑	Description	Due Date	App... to Order	Use Esti... Cost	Salespe... Code	Project Manager Code	Send to Stor... Mat...	Ship-to Code	Criti...	Comment	Delivery Sc Group Cod
	●	JOB000715	MM DEMO CONTRACT HARDW...	01	All Matl	6/15/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MM	MM	<input type="checkbox"/>		<input type="checkbox"/>		
	●	JOB000716	MM DEMO CONTRACT HARDW...	01	all matl	6/29/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MM	MM	<input type="checkbox"/>		<input type="checkbox"/>		
	●	JOB000722	PARADISE DOOR PROJECT	1	ext storefronts phase 1	5/31/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MM	BN	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
	●	JOB000722	PARADISE DOOR PROJECT	2	hardware	6/29/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MM	BN	<input type="checkbox"/>		<input type="checkbox"/>		
→	●	JOB000722	St. John's Hospital...Childrens.Ce...	1		7/31/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SL	SL	<input type="checkbox"/>		<input type="checkbox"/>		

Lines | Manage

Alerts	Relea... Status	Order Status	Change Order No. ↑	Type	No.	Description	Vend. No.	Qty	UOM	Purchasing Code	Mfg. Code	Due Date	Start/Order By Lead Time	Shipment Date	Start Date	Release No.
	●	■	0	Item	NSWDDOOR	30-70-1.75-GPD-PC-SRO	GRAMAN	2	EA	CONTRACT		7/31/2022	2D	7/31/2022	7/28/2022	1

## Quickly Review & Update:

- Due Dates
  - Should not be blank &/or < today
- Unscheduled Lines
  - Confirm all lines on job are scheduled
- Split Out Lines
- Purchasing Code
  - Change a release to ship direct
- Ship to Code
  - Handy for sending Hardware to Alum door installer
- Stored Material
  - SO lines will be shipped to stored
- Comments
- Navigate

# Navigate

**Contract Navigate**

Contract No. ..... JOB000672

Change Order No. .... 0

Item Category Code .....

Product Group Code .....

Release No. ....

Order Group No. ....

Vendor No. ....

Suppress Ship/Rcpt/Shop/Work Item Ledgers .....

Document Type	Document No.	Order No.	Customer / Vendor No.	Date	Expected Receipt Date	No. of Lines
Purchase Order	PO002056	PO002056	SCHLOC	4/14/2022	11/25/2021	1
Purchase Order	PO002050	PO002050	HAGER	10/14/2021	11/25/2021	2
Purchase Order	PO002048	PO002048	ABHMAN	10/14/2021	11/25/2021	2
Purchase Order	PO002053	PO002053	PDQIND	2/17/2022	11/25/2021	6
Purchase Receipt	PR001123	PO002049	CURRIES	4/14/2022		3
Purchase Receipt	PR001093	PO002054	ROCMAN	2/17/2022		4
Purchase Receipt	PR001124	PO002056	SCHLOC	4/14/2022		1
Purchase Receipt	PR001092	PO002053	PDQIND	2/17/2022		6
Shop Order	SHOP000372			1/13/2022		14
Shop Order	SHOP000371			1/13/2022		14

## Quick & Easy Access to History on Order:

- Contract
  - Contract
  - Category List
  - Group List
  - Vendors
  - Release Schedule
  - Material List/Component
  - Assign. Level 3 (Transactions/Posted Transactions/Material Schedule)
- Sales Order/ Purchase Order/ Shop Order
  - Associated Doc Navigate on the line ribbon

# Contract Close Out

**Contract Close-Out** 9/10/2022 8:50 AM  
 Cleveland Construction Supply Page 1  
 AITDOMTFOLSCROFT

No.: JOB000661, Contract State: <>Lost, Contract State Filter: <>Lost

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**Contract Statistics**

Contract No. and Name	Contract Amount	Sales To Date	Invoiced To Date	Remaining To Bill	Amount on Retainage	Payments To Date	Credits to Date	Planned Cost	Actual Cost To Date	Current WIP Inventory	Stored Material	Projected Profit
JOB000661 St. John's Hospital - BASHCO BAY SHORE Planning	31,265.45	0.00	0.00	31,265.45	0.00	0.00	0.00	22,952.17	0.00	0.00	0.00	8,313.28
												26.59

[Remaining Material](#)

Change Order No.	Line #	Item #	Description	Item Category	Product Group	Line Quantity	Qty to Release	Assignment List
	10000	NSAS	MCK305CN 84	HARDWARE	AS	1	1	Fir EXTERIOR Marks 101
	20000	NSBO	FB07M US28D	HARDWARE	BO	1	1	Fir INTERIOR Marks 106
	30000	NSBO	DPS2 US32D	HARDWARE	BO	1	1	Fir INTERIOR Marks 106
	40000	NSCL	351-O EN	HARDWARE	CL	3	3	Fir INTERIOR Marks 110, 222, 223
	50000	SAR30005	351-P9 EN	HARDWARE	CL	2	2	Fir INTERIOR Marks 106
	60000	SAR30005	351-P9 EN	HARDWARE	CL	2	2	Fir EXTERIOR Marks 102, Fir INTERIOR Marks 112
	70000	SAR30005	351-P9 EN	HARDWARE	CL	2	2	Fir EXTERIOR Marks 103, Fir INTERIOR Marks 105
	80000	SAR30005	351-P9 EN	HARDWARE	CL	2	2	Fir INTERIOR Marks 108, 109
	90000	SAR30005	351-P9 EN	HARDWARE	CL	2	2	Fir INTERIOR Marks 115
	100000	SAR30005	351-P9 EN	HARDWARE	CL	1	1	Fir INTERIOR Marks 111
	110000	SAR30005	351-P9 EN	HARDWARE	CL	6	6	Fir EXTERIOR Marks 101, 104, Fir INTERIOR Marks 107
	120000	NSCO	CSM596 PC	HARDWARE	CO	1	1	Fir INTERIOR Marks 106
	130000	NSED	12 8710 ETL US32D	HARDWARE	ED	2	2	Fir INTERIOR Marks 115
	140000	NSED	12 8713 ETL US32D	HARDWARE	ED	4	4	Fir EXTERIOR Marks 101, Fir INTERIOR Marks 107
	150000	NSED	12 8710 ETL US32D	HARDWARE	ED	1	1	Fir INTERIOR Marks 105

Use throughout job to see:

- Remaining Material
- Open Transactions (PO, Shop, SO)
- Unassociated Material
- Stored Material

# Profiles / User Interface

The screenshot displays the ContractERP user interface. At the top, there is a navigation bar with the company name "Commercial Construction Supplies" and several menu items: "Contracts", "Sales & Purchases", "Shop & Work Orders", "Reports", and "Posted". Below the navigation bar, there are tabs for "Items", "Customers", and "Vendors". The main content area features a header with the date "Today is 03/21/22" and the title "Getting to know ContractERP". To the right of the header is an "Actions" menu with options like "Contract Sale", "Sales Quote", "Sales Order", "Sales Return", "Requisition Worksheet", "Shop Order Worksheet", "Work Order Worksheet", "Release Worksheet", "Release Schedule Status", "Sales Status", "Purchase Status", "Shop Order Status", and "Work Order Status". Below the header is an "Activities" section with a search bar and a dropdown menu. The main dashboard consists of several data cards: "Contract Sales" (Planned: 0, In Process: 2, Completed: 0), "Contract Sales Order Shipment Status" (Not Shipped: 0, Partially Shipped: 0, Past Due: 0), "Material Management" (Unconfirmed PO Lines: 0, Unassociated L...: 0, Stored Material Lines: 0), "Non-Contract Sales" (Sales Quotes: 1, Sales Orders: 5, SO Past Req. Date: 5), "Alerts" (# Lines Past Due: 0), and "Admin Tasks" (My Open Tasks: 0, My Tasks Due ... 14 Days: 0).

Configuration vs Personalization

Column Ordering

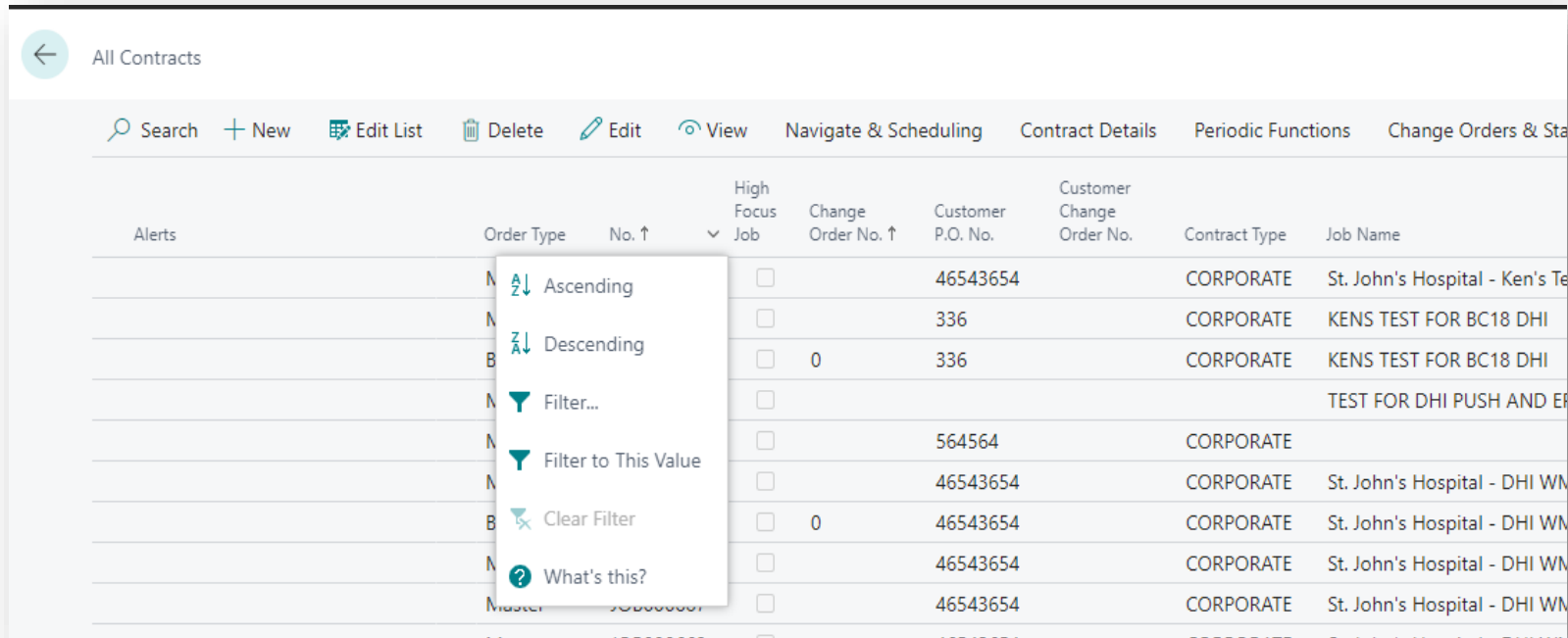
Remove excess columns

Streamline Look & Feel

Role Centers

Focus user's attention on tasks they need

# Sorting & Filtering



The screenshot shows a software interface for managing contracts. At the top, there is a navigation bar with a back arrow and the text "All Contracts". Below this is a toolbar with icons for Search, New, Edit List, Delete, Edit, View, and several menu items: "Navigate & Scheduling", "Contract Details", "Periodic Functions", and "Change Orders & Sta".

The main area contains a table with the following columns: Alerts, Order Type, No. ↑, High Focus Job, Change Order No. ↑, Customer P.O. No., Customer Change Order No., Contract Type, and Job Name. A dropdown menu is open over the "Order Type" column, showing options: Ascending, Descending, Filter..., Filter to This Value, Clear Filter, and What's this?.

Alerts	Order Type	No. ↑	High Focus Job	Change Order No. ↑	Customer P.O. No.	Customer Change Order No.	Contract Type	Job Name
	M	Ascending	<input type="checkbox"/>		46543654		CORPORATE	St. John's Hospital - Ken's Te
	M	Descending	<input type="checkbox"/>		336		CORPORATE	KENS TEST FOR BC18 DHI
	B	Filter...	<input type="checkbox"/>	0	336		CORPORATE	KENS TEST FOR BC18 DHI
	M	Filter to This Value	<input type="checkbox"/>		564564		CORPORATE	TEST FOR DHI PUSH AND EF
	M	Clear Filter	<input type="checkbox"/>		46543654		CORPORATE	St. John's Hospital - DHI WM
	B	What's this?	<input type="checkbox"/>	0	46543654		CORPORATE	St. John's Hospital - DHI WM
	M		<input type="checkbox"/>		46543654		CORPORATE	St. John's Hospital - DHI WM
	Master		<input type="checkbox"/>		46543654		CORPORATE	St. John's Hospital - DHI WM

Stop scrolling & start filtering

Click to sort Descending

Don't forget "All Columns"  
when filtering

# Dates, Dates & More Dates



**Starts at PM/Sales**

**Directly impacts Roles  
Downstream**

- Purchasing
- Shop
- Warehouse

**Pull work, instead of  
pushing**

- Work smart, not (as)  
hard