

Stock, POs and Deliveries

By Arwen Van Wyk
Training Co-Ordinator at Business Pilot
October 4th, 2023



WHAT WE WILL COVER

- Stock
 - Managing your stock
 - Where stock is integrated throughout BP
 - Reporting based off stock
- POs
 - How they drive efficient installations
 - How they protect your margin
- Deliveries
 - Using BP to better manage your goods in

STOCK - MANAGEMENT

BUSINESS PILOT

Welcome Lauren
Here's your daily summary

Week 39 Month 9 Q3 2023 Targets

Switch Board Ops

Your tasks
No overdue or due tasks today

Your feed
No unread mentions

What's on today
No events scheduled for today

Contracts owned
0 Contracts
No contracts in your name

Manage Stock

Allocate Stock

+ Add Stock Item + Raise Stock Order + Add Supplier Export To Excel

	Supplier	Nominal Code	Product Code	Name	Current Item Price	Current Stock Level	Current Stock Value	Min Stock Level	Target Restock
	Ac LLP	5000 - Purchase Invoices	ZAPWHT1P TETH (2H07TW)	White Zappl 1P Eco-Smart 7kW Type 2 Tethered	£1.61	291	£1,253.08	20	80
	CFS Fixings	5000 - Purchase Invoices	Whit00001	White Trim 25mm	£1.00	72	£900.00	20	150
	MJB Glazing & Fascias	5000 - Purchase Invoices	RL020SX	Smooth AG fillet	£5.19	35	£123.99	1	15
	ALMESCO LTD	5000 - Purchase Invoices	PR6852	Grey Silicon Tube 250ml	£1.00	1019	£519.00	20	200
	General Building Plastics Ltd	5000 - Purchase Invoices	FA90AGATE	95mm Architrave Agate RAL7038 Painswick Grey Grain 5M Liniar	£1.60	30	£47.88	10	10
	Edge Building Products	5000 - Purchase Invoices	EM28WF	28mmx6mm Edge Fillet White Ash	£23.30	50	£0.00	10	20
	General Building Plastics Ltd	5000 - Purchase Invoices	DLLMNWH	DL Chemical LMN Silicone White	£2.92	25	£73.00	5	10

STOCK - MANAGEMENT

Manage Stock Orders

[+ Add Stock Order](#) [Export To Excel](#)

	Date Added ↓	Order Number	Supplier	Reference	Total Items	Total Value	Date Delivered/Complete
	08/08/2023	114	MJB Glazing & Fascias	F4556Y	15	£15.00	08/08/2023
	05/07/2023	113	Eurocell Kingston Park	1234567890	100	£1,000.00	05/07/2023
	06/06/2023	112	CFS Fixings	032740247-2	100	£1,250.00	06/06/2023
	12/04/2023	111	Ac LLP		100	£1,000.00	12/04/2023
	29/03/2023	110	Darby Glass Ltd		50	£50.00	29/03/2023
	27/01/2023	109	Ac LLP	57y7f8	100	£106.75	27/01/2023
	27/01/2023	108	MJB Glazing & Fascias	GERT643wa	10	£51.90	27/01/2023
	19/01/2023	107					
	19/01/2023	106					
	09/01/2023	105					

Add Stock

Stock Details

Supplier	Window Ware (1100, DT10 7LX)
Nominal Code	5000 - Purchase Invoices
Product Code	GBK600282
Name	Flexible Corner Glazing Wedges - Mixed Box
Current Stock Level	5
Current Stock Value	£54.00
Minimum Stock Level	2
Target Restocking Level	1
Current Item Price	£10.80
Active?	<input checked="" type="checkbox"/> Yes

[Add](#)

View Stock Order

Stock Order - 107

Supplier: CFS Fixings (1106, L74 6JF)

Order Reference: 123

Confirm & Mark as Delivered:

Order Items

Line	Stock	Quantity	Total Value	
1	White Trim 25mm	100	£100.00	

£0.00 [+](#)

[Update](#)

ALLOCATING STOCK

Allocate Stock

Allocate Stock

Invoice Date: 21/09/2023
Stock: White Trim 25mm (CFS Fixings)
Quantity: 6
Contract: Mr M Greaves (C1142)

Export Job Cost?

[Remove](#) [Save](#)

Invoice Date: 21/09/2023
Stock: White Silicone (South Essex Sealed Units ...)
Quantity: 2
Contract: Mr M Greaves (C1142)

Export Job Cost?

[Remove](#) [Save](#)

[+ Add another line](#)

[Assign Stock](#)

Edit Contract

Contract Number: C1142
Lead Number: 1278
Customer: Mr M Greaves
BP Email: I-1278-BEDG@...

Details Activity Documents Images Templates Appointments Invoices Purchase Orders Fitting Guarantees Service

Finance Custom Fields

Finance Job Costs

Job Costs

[+ Add Cost](#) [+ Add Supplier](#) [Export To Excel](#) [Export To PDF](#) [Profit Report](#)

	Cost Id	Reference	Supplier	Cost Type	Invoice Date	Net Value	Exported?
Edit Delete	876808	Stock - White Trim 25mm	CFS Fixings	5000 - Purchase Invoices	21/09/2023	£75.00	<input checked="" type="checkbox"/>
						Total: £75.00	

10 items per page 1 - 1 of 1 items

ALLOCATING STOCK

Allocated Stock

[Export To Excel](#)

Customer	Contract	Fit Date	Last Invoice Date	Status	Status Date ↓	Supplier	Stock Name	Quantity
A Cooke	R1130	11/08/2023	29/06/2023	Created	31/07/2023	CFS Fixings	White Trim 25mm	11
A Cooke	R1130	11/08/2023	29/06/2023	Created	31/07/2023	Eurocell Kingston Park	Silicone white tub	2
DOYLE LTD	R1133		28/07/2023	Completed	04/07/2023	CFS Fixings	White Trim 25mm	2
DOYLE LTD	R1133		28/07/2023	Completed	04/07/2023	ALMESCO LTD	Grey Silicon Tube 250ml	3
Business Pilot CRM Ltd	R1131		03/07/2023	Completed	03/07/2023	CFS Fixings	White Trim 25mm	5
Mr A Rapsey	TSO1113	31/07/2023	16/11/2022	Allocated To Surveyor	04/04/2023	ALMESCO LTD	Grey Silicon Tube 250ml	15
Ms M Richards	R1122		15/03/2023	Created	15/03/2023	ALMESCO LTD	Grey Silicon Tube 250ml	4
Ms L Cooper	R1010		07/01/2022	Allocated To Surveyor	03/02/2023	South Essex Sealed Units Ltd	White Silicone	5
Ms L Cooper	R1010		07/01/2022	Allocated To Surveyor	03/02/2023	CFS Fixings	White Trim 25mm	35
Mrs C Weaver	R1111	31/10/2023	18/05/2023	Installation Scheduled	03/02/2023	South Essex Sealed Units Ltd	White Silicone	6

10 items per page 1 - 10 of 19 items

Allocated Stock (Live Contracts)

[Export To Excel](#)















Customer	Contract	Fit Date	Last Invoice Date	Status	Status Date ↓	Supplier	Stock Name	Quantity
A Cooke	R1130	11/08/2023	29/06/2023	Created	31/07/2023	CFS Fixings	White Trim 25mm	11
A Cooke	R1130	11/08/2023	29/06/2023	Created	31/07/2023	Eurocell Kingston Park	Silicone white tub	2
Mr A Rapsey	TSO1113	31/07/2023	16/11/2022	Allocated To Surveyor	04/04/2023	ALMESCO LTD	Grey Silicon Tube 250ml	15
Ms M Richards	R1122		15/03/2023	Created	15/03/2023	ALMESCO LTD	Grey Silicon Tube 250ml	4
Ms L Cooper	R1010		07/01/2022	Allocated To Surveyor	03/02/2023	South Essex Sealed Units Ltd	White Silicone	5
Ms L Cooper	R1010		07/01/2022	Allocated To Surveyor	03/02/2023	CFS Fixings	White Trim 25mm	35
Mrs C Weaver	R1111	31/10/2023	18/05/2023	Installation Scheduled	03/02/2023	South Essex Sealed Units Ltd	White Silicone	6
Mrs S Wallen	C1003	19/10/2023		Installation Scheduled	03/02/2023	Eurocell Kingston Park	Silicone white tub	5

10 items per page 1 - 8 of 8 items

STOCK ASSIGNMENT QUERIES

Manage Stock Assignment Queries

Export To Excel

	Date Added ↓	Added By	Supplier	Stock	Contract	Quantity Needed	Quantity Available At Time	Invoice Date	Date Actioned	Actioned By	Job Cost Number
 	05/07/2023	Rebecca Taylor (Operator)	MJB Glazing & Fascias	Smooth AG fillet	1003	50	20	05/07/2023			
 	06/06/2023	Rebecca Taylor (Operator)	MJB Glazing & Fascias	Smooth AG fillet	1020	25	20	06/06/2023			
 	27/01/2023	Rebecca Taylor (Operator)	CFS Fixings	White Trim 25mm	1020	8	6	27/01/2023	06/06/2023	Rebecca Taylor (Operator)	723038
 	27/01/2023	Rebecca Taylor (Operator)	CFS Fixings	White Trim 25mm	1020	8	6	27/01/2023			
 	19/01/2023	Rebecca Taylor (Operator)	CFS Fixings	White Trim 25mm	1077	8	6	12/01/2023	05/07/2023	Rebecca Taylor (Operator)	
 	09/01/2023	Rebecca Taylor (Operator)	CFS Fixings	White Trim 25mm	1020	4	0	09/01/2023	09/01/2023	Rebecca Taylor (Operator)	
 	05/01/2023	Rebecca Taylor (Operator)	CFS Fixings	White Trim 25mm	1020	14	14	05/01/2023	05/01/2023	Rebecca Taylor (Operator)	

10 items per page

View Stock Query

Stock Assignment Query

On 05/07/2023 Rebecca Taylor (Operator) tried to assign 50 units of Smooth AG fillet to contract 1003 but it failed since there were only 20 items in stock at the time. Please ensure there is enough stock available before proceeding.

Supplier: MJB Glazing & Fascias (1129, AB55 1MU)

Invoice Date: 05/07/2023

Stock Item: Smooth AG fillet

Quantity Needed: 50

Contract: Mrs S Wallen (C1003)















Action Again? No

HOW STOCK LINKS TO JOB COSTS

Live Job Costs

[+ Bulk Upload](#) [Record Invoices](#)

[+ Add Cost](#) [+ Add Supplier](#) [Export To Excel](#) [Export To PDF](#)

	Cost Id	Reference	Customer Company Name	Customer First Name	Customer Last Name	Contract Number	Supplier	Cost Type	Invoice Date	Net Value	Exported?
 	876482	Stock - White Trim 25mm		Alice	Cooke	R1130	CFS Fixings	5000 - Purchase Invoices	29/09/2023	£75.00	✘
 	876483	Stock - Silicone white tub		Alice	Cooke	R1130	Eurocell Kingston Park	5000 - Purchase Invoices	29/09/2023	£20.00	✘
 	871429	Commissions		Darshan	Kishore Cruz	TSO1124	Callum Hawkes	5000 - Purchase Invoices	22/09/2023	£1,358.68	✘
 	876808	Stock - White Trim 25mm		Markus	Greaves	C1142	CFS Fixings	5000 - Purchase Invoices	21/09/2023	£75.00	✘
 	857675	1131 / 1286		Darshan	Kishore Cruz	TSO1124	Affordable Aluminium Systems	5000 - Purchase Invoices	06/09/2023	£12,000.00	✘
 	768714	Stock - White Trim 25mm		Alice	Cooke	R1130	CFS Fixings	5000 - Purchase Invoices	31/07/2023	£62.50	✘
 	748468	Stock - Silicone white tub		Sharon	Wallen	C1003	Eurocell Kingston Park	5000 - Purchase Invoices	05/07/2023	£50.00	✘

STOCK VALUATION REPORT






The screenshot displays the BusinessPilot dashboard with a dark sidebar on the left. The sidebar contains the following menu items: Enquiries, Contacts, Leads, Contracts, Diary, Schedule, Orders, Stock, Service, Finance, MI, Reports, Export, and Admin. The 'Reports' item is highlighted with an orange arrow. The main content area features a search bar at the top with the placeholder text 'Type to search...'. Below the search bar, there are four report cards arranged in a 2x2 grid. Each card has a green header bar with an Excel icon and the word 'Excel'. The top-left card is titled 'Job Cost Report' and includes a 'Report Date Type' dropdown set to 'Revenue Recognition Date', a 'From' date field set to '01/10/2023', and a 'To' date field set to '31/10/2023'. The top-right card is titled 'Completed Contract Report' and includes a 'Report Date' field set to '01/10/2023', an 'Exclude contract before' field, and a 'Completion Date' dropdown set to 'Revenue Recognition Date'. The bottom-left card is titled 'Stock Valuation Report' and includes a 'Report Date' field set to '01/10/2023'. The bottom-right card is empty. In the top right corner of the dashboard, there are three circular icons: a question mark, a user profile, and a notification bell. An orange arrow points to the 'BusinessPilot' logo in the top left corner, and another orange arrow points to the 'Reports' menu item in the sidebar.

Balances Outstanding


Supplier	Stock	Quantity	Value	Min Stock Level	Target Restocking Level	Active?
Ac LLP	White Zappi 1P Eco-Smart 7kW Type 2 Tethered	291	£1,253.51	20	80	No
ALMESCOLTD	Grey Silicon Tube 250ml	1019	£519.00	20	200	Yes
CFS Fixings	White Trim 25mm	78	£975.00	20	150	Yes
Darby Glass Ltd	End Caps 7016	150	£150.00	80	200	Yes
Edge Building Products	28mmx6mm Edge Fillet White Ash	50	£0.00	10	20	Yes
Eurocell Kettering	150 A-Type Cill	3	£17.07	1	1	Yes
Eurocell Kingston Park	Silicone white tub	195	£1,950.00	20	500	Yes
General Building Plastics Ltd	95mm Architrave Agate RAL7038 Painswick Grey Grain 5MLinlar	30	£48.00	10	10	Yes
General Building Plastics Ltd	DL Chemical LMN Silicone White	25	£73.00	5	10	Yes
MJB Glazing & Fascias	Smooth AG fillet	35	£124.00	1	15	Yes
South Essex Sealed Units Ltd	White Silicone	99	£99.00	15	100	Yes
Total		£1,975.00	£5,208.58			

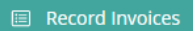
	A	B	C	D	E	F	G
1	Supplier	Stock	Quantity	Value	Min Stock Level	Target Restocking Level	Is Active?
2	Ac LLP	White Zappi 1P Eco-Smart 7kW Type 2 Tethered	291	1253.51	20.00	80.00	FALSE
3	ALMESCO LTD	Grey Silicon Tube 250ml	1019	519.00	20.00	200.00	TRUE
4	CFS Fixings	White Trim 25mm	78	975.00	20.00	150.00	TRUE
5	Darby Glass Ltd	End Caps 7016	150	150.00	80.00	200.00	TRUE
6	Edge Building Products	28mmx6mm Edge Fillet White Ash	50	0.00	10.00	20.00	TRUE
7	Eurocell Kettering	150 A-Type Cill	3	17.07	1.00	1.00	TRUE
8	Eurocell Kingston Park	Silicone white tub	195	1950.00	20.00	500.00	TRUE
9	General Building Plastics Ltd	95mm Architrave Agate RAL7038 Painswick Grey Grain 5M Linlar	30	48.00	10.00	10.00	TRUE
10	General Building Plastics Ltd	DL Chemical LMN Silicone White	25	73.00	5.00	10.00	TRUE
11	MJB Glazing & Fascias	Smooth AG fillet	35	124.00	1.00	15.00	TRUE
12	South Essex Sealed Units Ltd	White Silicone	99	99.00	15.00	100.00	TRUE
13							





FROM STOCK TO PURCHASE ORDERS



















































BusinessPilot     

BUSINESS PILOT

- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
-  **Orders**
 - Live POs
 - All POs
 - Deliveries
 - Unassigned Provisional Suppliers
- Stock
- Service
- Finance
- MI
- Reports
- Export

Live Purchase Orders 

	PO No.	Customer	Contract	Supplier	Supplier Ref.	Items	Items Outstanding	Ordered ↓	Status	Delivery	Fit Date	Net Value
    	374	Miss K Harris	RWD330	Pilkington Glass	123	1	1	22/09/2023	Provisional	29/09/2023	18/09/2023	£20.00
    	373	Miss K Harris	RWD317	A B Sealants Ltd	123	1	1	07/09/2023	Provisional	12/10/2023	25/09/2023	£1,000.00
    	372	Miss K Harris	RWD317	A B Sealants Ltd	123	1	1	30/08/2023	Provisional	31/08/2023	25/09/2023	£100.00
    	371	Miss K Harris	RWD317	Aluk	317	1	1	25/07/2023	Provisional	14/08/2023	25/09/2023	£20,000.00
    	361	Mr R Harris	RWD325	Origin Frames Ltd	325	1	1	09/05/2023	Provisional	25/04/2023	22/06/2023	£300.00
    	349	Mr & Mrs Harris	RWD316	Aluk	TR144404	1	1	10/03/2023	Confirmed	31/03/2023	20/03/2023	£600.00
    	346	Mr & Mrs Harris	RWD316	Bereco		1	1	09/03/2023	Confirmed	28/04/2023	20/03/2023	£2,850.00
    	343	Mr T Boy	RWD310	Origin Frames Ltd	SMith	3	3	06/03/2023	Provisional	04/04/2023	06/03/2023	£850.00
    	341	Mr D Ginger	RWD298	Aluco Aluminium Ltd	TR7787	2	2	29/11/2022	Confirmed	06/01/2023	14/11/2022	£9,558.00
    	339	Mr T Hart	RWD301	Origin Frames Ltd	Hart	1	1	17/11/2022	Provisional	21/11/2022	02/12/2022	£25.00
												Total: £104,343.50

ADDING PURCHASE ORDERS

Add Purchase Order

Purchase Order Details

Contract: Mr M Glass (163) Remake/Recharge? No

Supplier: Aluco Aluminium Ltd (183,000) Confirm & Mark as Delivered No

Supplier Reference: MGL234

Estimated Delivery Date: 27/10/2023

Delivery To Site? Yes

Affect Schedule Board? Yes

Order Contact: Matthew Wren

Special Instruction:

Order Items

Line	Quantity	Item	Net Value	
1	1	Anthracite Grey Entrance Door - Long Bar Handle - Frosted Glass	£2000.00	<input type="checkbox"/> <input type="checkbox"/>
2	1	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>


Add Order

Remake/Recharge? Yes

Remake Route Of Issue: --Select Route Of Issue--



















































Reason For Remake:

MANAGING PURCHASE ORDERS

Type to search... 

Live Purchase Orders Record Invoices

[+ Add Purchase Order](#) [+ Add Supplier](#) [Export To Excel](#) [Export To PDF](#)



















































	PO No.	Customer	Contract	Supplier	Supplier Ref.	Items	Items Outstanding	Ordered ↓	Status	Delivery	Fit Date	Net Value
    	374	Miss K Harris	RWD330	Pilkington Glass	123	1	1	22/09/2023	Provisional	29/09/2023	18/09/2023	£20.00
    	373	Miss K Harris	RWD317	A B Sealants Ltd	123	1	1	07/09/2023	Provisional	12/10/2023	25/09/2023	£1,000.00
    	372	Miss K Harris	RWD317	A B Sealants Ltd	123	1	1	30/08/2023	Provisional	31/08/2023	25/09/2023	£100.00
    	371	Miss K Harris	RWD317	Aluk	317	1	1	25/07/2023	Provisional	14/08/2023	25/09/2023	£20,000.00
    	361	Mr R Harris	RWD325	Origin Frames Ltd	325	1	1	09/05/2023	Provisional	25/04/2023	22/06/2023	£300.00
    	349	Mr & Mrs Harris	RWD316	Aluk	TR144404	1	1	10/03/2023	Confirmed	31/03/2023	20/03/2023	£600.00
    	346	Mr & Mrs Harris	RWD316	Bereco		1	1	09/03/2023	Confirmed	28/04/2023	20/03/2023	£2,850.00
    	343	Mr T Boy	RWD310	Origin Frames Ltd	SMith	3	3	06/03/2023	Provisional	04/04/2023	06/03/2023	£850.00
    	341	Mr D Ginger	RWD298	Aluco Aluminium Ltd	TR7787	2	2	29/11/2022	Confirmed	06/01/2023	14/11/2022	£9,558.00
    	339	Mr T Hart	RWD301	Origin Frames Ltd	Hart	1	1	17/11/2022	Provisional	21/11/2022	02/12/2022	£25.00
												Total: £104,343.5

Quickly email POs using Bpmail

Export POs as Word docs or POs

- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
- Orders
 - Live POs
 - All POs
 - Deliveries
 - Unassigned Provisional Suppliers
- Stock
- Service
- Finance
- MI
- Reports
- Export

[+ Add Purchase Order](#)
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	PO No.	Customer	Contract	Supplier	Supplier Ref.	Items	Items Outstanding	Ordered	Status	Delivery	Fit Date	Net Value	Net Invoices Rcvd
    	1133	Ms E McKerlie	C1050	Brisant-Secure Ltd	MGL234	1	1	01/10/2023	Provisional	08/12/2023	27/11/2023	£120.00	
    	1131	Mr D Kishore Cruz	TSO1124	Affordable Aluminium Systems	Ref	10	10	06/09/2023	Confirmed	13/09/2023		£12,000.00	£12,000.00
    	1127	Havelock Infant School	C1138	GS Plastering	Havelock C1138	11	11	01/08/2023	Provisional	15/08/2023		£110.00	
    	1126	Havelock Infant School	C1138	Affordable Aluminium Systems	Havelock C1138	4	4	01/08/2023	Provisional	15/08/2023		£300.00	
    	1123	Ms R Mariaux	TSO1064	Affordable Aluminium Systems	Test	2	2	31/07/2023	Confirmed	17/08/2023	16/08/2023	£0.00	
    	1121	Ms P Curran	C1068	ALMESCO LTD	2345678	1	1	19/07/2023	Provisional		22/09/2023	£0.00	
    	1117	BP Ltd	R1132	Arkay Windows	Doyle 1132	2	1	03/07/2023	Confirmed	20/10/2023	13/10/2023	£1,500.00	
    	1112	Mr & Miss A Van Wyk	R1129	Coastal Specialist Ironmongery	R1129 / Arwen	30	2	27/06/2023	Confirmed	14/08/2023	26/02/2024	£220.00	£220.00
    	1003	Mr T Farebrother	RSO1006	Johnsons Decorating Centre	1006 / Smith / QUK4545454	12	12	23/07/2022	Provisional			£120,010.00	
    	1080	Ms C Parsons	TSO1093	Direct Locks		1							



Purchase Orders

PO No.	Contract	Supplier	Supplier Ref.	Date Ordered	Status	Delivery Date	Fit Date	Net Value	Inv Recorded?
1131	Mr D Kishore Cruz	Affordable Aluminium Systems	Ref	06/09/2023	Confirmed	13/09/2023		£12,000.00	Yes
1130	Miss A Doyle	Dempsey Dyer Ltd	Doyle 1112	04/09/2023	Confirmed	23/03/2024	13/03/2024	£0.00	No
1127	Havelock Infant School	GS Plastering	Havelock C1138	01/08/2023	Provisional	15/08/2023		£110.00	No
1126	Havelock Infant School	Affordable Aluminium Systems	Havelock C1138	01/08/2023	Provisional	15/08/2023		£300.00	No
1123	Ms R Mariaux	Affordable Aluminium Systems	Test	31/07/2023	Confirmed	17/08/2023	16/08/2023	£0.00	No
1121	Ms P Curran	ALMESCO LTD	2345678	19/07/2023	Provisional		22/09/2023	£0.00	No
1117	BP Ltd	Arkay Windows	Doyle 1132	03/07/2023	Confirmed	01/08/2023	10/08/2023	£1,500.00	No
1112	Mr & Miss A Van Wyk	Coastal Specialist Ironmongery	R1129 / Arwen	27/06/2023	Confirmed	14/08/2023	26/02/2024	£220.00	Yes
1003	Mr T Farebrother	Johnsons Decorating Centre	1006 / Smith / QUK4545454	23/07/2022	Provisional			£120,010.00	No
1080	Ms C Parsons	Direct Locks		22/07/2022	Provisional		05/09/2023	£3,633.72	No

PROVISIONAL SUPPLIERS

Create Contract

Contract Number: 1143
Customer: Ms C Hobday

Contract Details Documents

Billing Contact

Ms Claudia Hobday
01314 375076
07836 749148
claudia.hobday@example.co.uk
hobday.claudia@example.co.uk

Billing Address

0 Cody Court
Sutton
England
RH5 4BO

Install Address

0 Cody Court
Sutton
England
RH5 4BO

0.0 miles

00:00

Lead Details

Sales Person

John Mills

Sales Area

Dorset

Lead Sold Value (Net)

£13,835.41

Sold On

01/10/2023

Product Type

Aluminium - Origin OW80

Product Interest (Main)

Window - Flush

Provisional Suppliers

+ Add new provisional supplier

Supplier	Provisional PO Net Value
Total: £0.00	
No suppliers added/remaining	

0 items per page No items to display

← Back

Next →

Edit

Supplier

Affordable Aluminium System...

Provisional Net Value

£1,500.00

✓ Update

⊗ Cancel

PROVISIONAL SUPPLIERS

Create Contract

Contract Number: 1143
Customer: Ms C Hobday

Contract Details Documents

Billing Contact

Ms Claudia Hobday
01314 375076
07836 749148
claudia.hobday@example.co.uk
hobday.claudia@example.co.uk

Billing Address

0 Cody Court
Sutton
England
RH5 4BO

Install Address

0 Cody Court
Sutton
England
RH5 4BO
0.0 miles
00:00

Lead Details

Sales Person

John Mills

Sales Area

Dorset

Lead Sold Value (Net)

£13,835.41

Sold On

01/10/2023

Product Type



Aluminium - Origin OW80

Product Interest (Main)

Window - Flush

Provisional Suppliers

+ Add new provisional supplier

Supplier	Provisional PO Net Value	
Affordable Aluminium Systems (1050, CV35 4KT)	£1,500.00	 
Total: £1,500.00		

10 items per page 1 - 1 of 1 items

← Back

Next →

PROVISIONAL SUPPLIER TO PO


Edit Contract

Contract Number: RSO1143
Lead Number: 1149
Customer: Ms C Hobday
BP Email: l-1149-BEDG@...

Contract Details Activity Documents Images Templates Appointments Invoicing **Purchase Orders** Fitting Guarantees Service Finance Custom Fields

Provisional Suppliers

+ Add new provisional supplier

Supplier	Provisional PO Net Value	PO Created?	
Affordable Aluminium Systems (1050, CV35 4KT)	£1,500.00		
Total: £1,500.00			

10 items per page 1 - 1 of 1 items

Purchase Orders

+ Add Purchase Order + Add Supplier Export To Excel Export To PDF

PO No.	Supplier	Supplier Ref.	Items	Items Outstanding	Ordered	Status	Delivery	Fit D

10 items per page

Warning

Warning: The PO Net Value of £2,500.00 is higher than the provisional value of £2,000.00 by more than the percentage tolerance.

Are you sure you still wish to confirm the order?

Yes No

PROVISIONAL SUPPLIER TO PO

Add Purchase Order

Purchase Order Details

Supplier: Affordable Aluminium Systems (1050, CV35 4KT)

Supplier Reference:

Estimated Delivery Date:

Delivery To Site? No

Affect Schedule Board? Yes

Order Contact: -- Select --

Remake/Recharge? No

Confirm & Mark as Delivered: No

Special Instruction:

Order Items

Line	Quantity	Item	Net Value	
1	1	<input type="text"/>	£1,500.00	<input type="button" value="Add"/>

UNASSIGNED PROVISIONAL SUPPLIERS

Unassigned Provisional Suppliers

Export To Excel

	Supplier	Contract No. ↓	Customer	Provisional PO Net Value	Contract Type	Contract Value (Net)	Install Start	Fit Days / Booked	Contract Status	Contract Status Date	Contract Value (Gross)
	ALMESCO LTD	TSO1123	Ms S Cuyler	£10.00	Trade Supply Only	£97,627.38	02/08/2023	2 / 2	Created	10/05/2023	£117,152.86
	Affordable Aluminium Systems	TSO1123	Ms S Cuyler	£1,000.00	Trade Supply Only	£97,627.38	02/08/2023	2 / 2	Created	10/05/2023	£117,152.86
	Instore	TSO1109	Mr A Rapsey		Trade Supply Only	£38,793.76		7 / 0	Completed	11/01/2023	£46,552.51
	Bereco Ltd	TSO1109	Mr A Rapsey		Trade Supply Only	£38,793.76		7 / 0	Completed	11/01/2023	£46,552.51
	Affordable Aluminium Systems	TSO1007	Mr & Mrs T Johnson		Trade Supply Only	£99,797.55	12/10/2023	6 / 6	Installation Scheduled	03/02/2023	£119,757.06
	Affordable Aluminium Systems	TSO1002	Mr M Gunetillek	£1,000.00	Trade Supply Only	£16,930.35	02/10/2023	0.5 / 0.5	Installation Scheduled	03/02/2023	£20,316.42
	ACJ Electrical Ltd	T1120	Mr & Mrs C Weaver		Trade Supply & Fit	£12,000.00	13/12/2023	2 / 2	Created	24/02/2023	£14,400.00
	John Fredericks Frames and Glass SHRW 5011	RSO1112	Mrs P Turlier		Retail Supply Only	£25,246.52	22/01/2024	2 / 2	Installation Scheduled	29/11/2022	£30,295.82
	Bereco Ltd	RSO1112	Mrs P Turlier		Retail Supply Only	£25,246.52	22/01/2024	2 / 2	Installation Scheduled	29/11/2022	£30,295.82

DRIVING YOUR SCHEDULE BOARD

Export to Excel Show service calls & surveys

NEW Map View

	Week 39: £73,250.52					Week 40: £93,832.33								
	25/09	26/09	27/09	28/09	29/09	30/09	01/10	02/10	03/10	04/10	05/10	06/10	07/10	08/10
1. James & Matthew	T1108 Coombs NORTON	T1108 Coombs NORTON	T1108 Coombs NORTON	T1108 Coombs NORTON	T1108 Coombs NORTON			T1108 Coombs NORTON	RSO1105 Williams NEWTOW N	RSO1105 Williams NEWTOW N	RSO1105 Williams NEWTOW N	RSO1105 Williams NEWTOW N		
2. Steve & Michael	RSO1082 English MAIDENH EAD	RSO1082 English MAIDENH EAD	RSO1082 English MAIDENH EAD		T1102 Bisson CHURCH END			T1102 Bisson CHURCH END TSO1002 Gunetille	T1107 Weathers MIDDLET ON	RSO1075 Harding CHURCH END	RSO1075 Harding CHURCH END	RSO1075 Harding CHURCH END		
	Week 43: £128,252.57					Week 44: £178,705.32								
	23/10	24/10	25/10	26/10	27/10	28/10	29/10	30/10	31/10	01/11	02/11	03/11	04/11	05/11
1. James & Matthew	TSO1002 Moring ASTON	TSO1002 Moring ASTON	TSO1002 Moring ASTON	TSO1002 Moring ASTON	TSO1002 Moring ASTON			TSO1002 Moring ASTON	T1070 Eyles R1111 Weaver		R1111 Weaver HODDESD ON	R1111 Weaver HODDESD ON		
2. Steve & Michael	C1003 Wallen WOOTTO N	C1003 Wallen WOOTTO N	C1003 Wallen WOOTTO N	C1003 Wallen WOOTTO N	C1003 Wallen WOOTTO N			C1003 Wallen WOOTTO N	R1111 Weaver T1072 Walker	R1116 Little UPTON	R1116 Little UPTON	R1116 Little UPTON TSO1033 Bhogal		

TSO1004
Austin
NEWTON

TSO1004
Austin
NEWTON

TSO1004
Austin
NEWTON

R1141
Annie
Doyle
DERBY

R1141
Annie
Doyle
DERBY

R1141
Annie
Doyle
DERBY

R1141
Annie
Doyle
DERBY

R1141
Annie
Doyle
DERBY

R1141
Annie
Doyle
DERBY

RSO1075
Harding
CHURCH
END

RSO1075
Harding
CHURCH
END

RSO1075
Harding
CHURCH
END

27/11 Outstanding POs
1133 - Brisant-Secure Ltd - Not confirmed







C1050
McKerlie
FORD
McKerlie (C1050)
43 Spohn Place
Ford
GL54 1HG
Fit value: £10,205.99

T1104

JOB COSTS

Live Job Costs + Bulk Upload Record Invoices

+ Add Cost + Add Supplier Export To Excel Export To PDF

	Cost Id	Reference	Customer First Name	Customer Last Name	Contract Number	Supplier	Cost Type	Invoice Date	Net Value	Exported?	PO Remake?	PO Reason For Remake
 	872216	374 / 1234	Katie	Harris	RWD330	Pilkington Glass	5000 - Purchase Invoices	25/09/2023	£20.00		✓	Unit broken on fitting
 	872217	374 / 789	Katie	Harris	RWD330	Pilkington Glass	5000 - Purchase Invoices	25/09/2023	-£20.00		✓	Unit broken on fitting
 	512147	314 / 123456	For	Example	RWD284	Aluco Aluminium Ltd	5000 - Purchase Invoices	06/07/2022	£550.00	✓	✓	Aperture was the wrong size





Contract Number: TSO1124
Lead Number: 1282
Customer: Mr D Kishore Cruz
BP Email: I-1282-BEDG@...

Contract Details Activity Documents Images Templates Appointments Invoices Purchase Orders Fitting Guarantees Service

Finance **Custom Fields**

Job Costs

+ Add Cost + Add Supplier Export To Excel Export To PDF Profit Report

	Cost Id	Reference	Supplier	Cost Type	Invoice Date	Net Value	Exported?
 	871429	Commissions	Callum Hawkes	5000 - Purchase Invoices	22/09/2023	£1,358.68	✗
 	857675	1131 / 1286	Affordable Aluminium Systems	5000 - Purchase Invoices	06/09/2023	£12,000.00	✗
						Total: £13,358.68	

10 items per page 1 - 2 of 2 items





















JOB COSTS

- BUSINESSPILOT-TRAINING
- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
- Orders
- Stock
- Service
- Finance**
 - Live Job Costs
 - All Job Costs
 - Invoice Queries
- MI
- Reports
- Export
- Admin

Job Costs

[+ Bulk Upload](#) [Record Invoices](#)

[+ Add Cost](#) [+ Add Supplier](#) [Export To Excel](#) [Export To PDF](#)

	Cost Id	Reference	Customer First Name	Customer Last Name	Contract Number	Supplier	Cost Type	Invoice Date ↓	Net Value	Exported?
 	876482	Stock - White Trim 25mm	Alice	Cooke	R1130	CFS Fixings	5000 - Purchase Invoices	29/09/2023	£75.00	✘
 	876483	Stock - Silicone white tub	Alice	Cooke	R1130	Eurocell Kingston Park	5000 - Purchase Invoices	29/09/2023	£20.00	✘
 	871429	Commissions	Darshan	Kishore Cruz	TSO1124	Callum Hawkes	5000 - Purchase Invoices	22/09/2023	£1,358.68	✘
 	876808	Stock - White Trim 25mm	Markus	Greaves	C1142	CFS Fixings	5000 - Purchase Invoices	21/09/2023	£75.00	✘
 	857675	1131 / 1286	Darshan	Kishore Cruz	TSO1124	Affordable Aluminium Systems	5000 - Purchase Invoices	06/09/2023	£12,000.00	✘
 	768714	Stock - White Trim 25mm	Alice	Cooke	R1130	CFS Fixings	5000 - Purchase Invoices	31/07/2023	£62.50	✘
 	748468	Stock - Silicone white tub	Sharon	Wallen	C1003	Eurocell Kingston Park	5000 - Purchase Invoices	05/07/2023	£50.00	✘
 	745901	1112 / 163423	Arwen K	Van Wyk	R1129	Coastal Specialist Ironmongery	5000 - Purchase Invoices	30/06/2023	£220.00	✘
 	745902	Install 09/07	Arwen K	Van Wyk	R1129	Callum Hawkes	5000 - Purchase Invoices	30/06/2023	£150.00	✘
 	701426	1104 / 123	Tracey+Mark	Johnson	TSO1007	Alpha Plumbing & Heatings	5000 - Purchase Invoices	18/05/2023	£500.00	✘
									Total: £943,023.05	

JOB COST REPORT

BUSINESSPILOT-TRAINING

- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
- Orders
- Stock
- Service
- Finance
- MI
- Reports**
- Export
- Admin

Aged Debtors Report

Report Date: 01/10/2023

Invoice Types: Select Invoice Types

PDF Excel

Fitting Schedule Report

From: 01/10/2023 To: 31/10/2023

Contract Types: Select Contract Types

PDF Excel

Financial Fitting Schedule Report

From: 01/10/2023 To: 31/10/2023

Contract Types: Select Contract Types Report Type: Grouped

PDF Excel


Job Cost Report

Report Date Type: Revenue Recognition Date

Contract Completion Date Contract Date (Live PO Only)

To: 31/10/2023

PDF Excel



PROTECTING YOUR MARGIN

“We were overspending on glass...it was actually an admin error on the glass company’s side, but we didn’t realise until we were tracking the costs using POs...”







DELIVERIES

Deliveries

+ Add Purchase Order

Export To Excel

Export To PDF

	PO No.	Supplier	Supplier Reference	Customer	Contract No.	Delivery Date	Delivery Status	Quantity	Item	Install Date
  	1130	Dempsey Dyer Ltd	Doyle 1112	Miss A Doyle	R1141	23/03/2024	Confirmed	1	IGU for window	13/03/2024
  	1131	Affordable Aluminium Systems	Ref	Mr D Kishore Cruz	TSO1124	13/09/2023	Confirmed	10	Windows	

View Purchase Order

PO Details | Deliveries | Invoices

Delivery Summary

Line	Item	Qty	Qty Received
1	IGU for window	1	0
		1	0

Delivery Date: 30/09/2023

New Delivery Date:

Delivery Incomplete Reason:

Update







DELIVERY GRIDS

Deliveries

+ Add Purchase Order

Export To Excel

Export To PDF










	PO No. :	Supplier :	Supplier Reference :	Customer :	Contract No. :	Delivery Date ↓ :	Delivery Status :	Quantity :	Item :	Install Date :
  	1130	Dempsey Dyer Ltd	Doyle 1112	Miss A Doyle	R1141	23/03/2024	Confirmed	1	IGU for window	13/03/2024
  	1131	Affordable Aluminium Systems	Ref	Mr D Kishore Cruz	TSO1124	13/09/2023	Confirmed	10	Windows	

Deliveries

+ Add Purchase Order

Export To Excel


































Export To PDF

	PO No. :	Supplier :	Supplier Reference :	Customer :	Contract No. :	Delivery Date :	Delivery Status :	Quantity :	Item :	Install Date :	Delivery Shortfall Reason ↓ :
  	1117	Arkay Windows	Doyle 1132	BP Ltd	R1132	20/10/2023	Confirmed	1	Aluminium bifold x1	13/10/2023	Missing handle on comp door
  	1117	Arkay Windows	Doyle 1132	BP Ltd	R1132	20/10/2023	Confirmed	1	Composite Door & Frame x1	13/10/2023	Missing handle on comp door
  	1112	Coastal Specialist Ironmongery	R1129 / Arwen	Mr & Miss A Van Wyk	R1129	14/08/2023	Confirmed	10	10 white woodgrain windows	26/02/2024	1x smashed obsc unit

DELIVERY GRIDS

Deliveries

[+ Add Purchase Order](#)
[Export To Excel](#)
[Export To PDF](#)

	PO No.	Supplier	Supplier Reference
  	1133		MGL234
  	1131	Systems	Ref
  	1123		
  	1126		
  	1127	GS Plastering	
  	1127	GS Plastering	
  	1112	Coastal Specialist Ironmongery	
  	1112	Coastal Specialist Ironmongery	
  	1112	Coastal Specialist Ironmongery	
  	1117	Arkay Windows	
  	1117	Arkay Windows	

Sort Ascending

Sort Descending

Columns

Filter

PO No.

Supplier

Supplier Reference

Customer

Contract No.

Delivery Date

Delivery Status

Quantity

Item

Install Date

Customer Company Name

Customer First Name

Customer Last Name

Contract Number





Order Contact

Install Name

Install Address

Delivery To Site?

Delivery Shortfall Reason



1



20 items per page



Deliveries									
PO No.	Supplier	Customer	Contract	Status	Delivery Date	Estimated?	Item	Qty	Qty Rcvd
1133	Brisant-Secure Ltd	Ms E McKerlie	C1050	Provisional	08/12/2023	Yes	lock cylinder	1	0
1131	Affordable Aluminium Systems	Mr D Kishore Cruz	TSO1124	Confirmed	13/09/2023	No	Windows	10	0
1123	Affordable Aluminium Systems	Ms R Mariaux	TSO1064	Confirmed	17/08/2023	No	2 windows	2	0
1126	Affordable Aluminium Systems	Havelock Infant School	C1138	Provisional	15/08/2023	Yes	4 x windows white woodgrain	4	0
1127	GS Plastering	Havelock Infant School	C1138	Provisional	15/08/2023	Yes	10 sealed units 2 obscure	10	0
1127	GS Plastering	Havelock Infant School	C1138	Provisional	15/08/2023	Yes	Delivery Charge	1	0
1112	Coastal Specialist Ironmongery	Mr & Miss A Van Wyk	R1129	Confirmed	14/08/2023	No	10 white woodgrain windows	10	10
1112	Coastal Specialist Ironmongery	Mr & Miss A Van Wyk	R1129	Confirmed	14/08/2023	No	18 unit	18	10
1112	Coastal Specialist Ironmongery	Mr & Miss A Van Wyk	R1129	Confirmed	14/08/2023	No	2 obsc	2	0
1117	Arkay Windows	BP Ltd	R1132	Confirmed	01/08/2023	No	Aluminium bifold x1	1	0
1117	Arkay Windows	BP Ltd	R1132	Confirmed	01/08/2023	No	Composite Door & Frame x1	1	0

REMAKES / RECHARGES

Add Purchase Order

Purchase Order Details

Contract: Mr M Glass (163)

Supplier: Aluco Aluminium Ltd (183,000)

Supplier Reference: MGL234

Estimated Delivery Date: 27/10/2023

Delivery To Site?

Affect Schedule Board?

Order Contact: Matthew Wren

Remake/Recharge: No Yes

Confirm & Mark as Delivered: No Yes

Special Instruction:

Order Items

Line	Quantity	Item	Net Value	
1	1	Anthracite Grey Entrance Door - Long Bar Handle - Frosted Glass	£2000.00	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Remake/Recharge?

Yes

Remake Route Of Issue

--Select Route Of Issue--

- Select Route Of Issue--
- Broken in transit
- Damage on site
- Damaged in warehouse
- Installation issue
- Manufacturer error
- Sales error
- Survey error

Reason For Remake

Confirm & Mark as Delivered

Special Instruction

Manage PO Remake Route Of Issues

Name	
Broken in transit	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Damage on site	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Damaged in warehouse	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Installation issue	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Manufacturer error	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Sales error	<input type="button" value="Edit"/> <input type="button" value="Delete"/>