

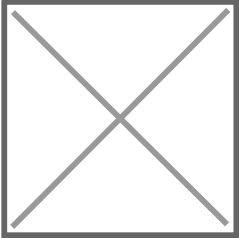
Icons Defined

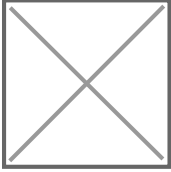
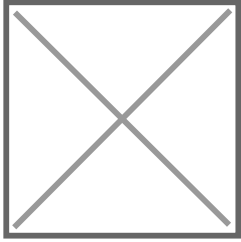
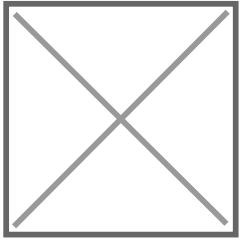
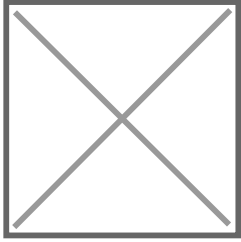
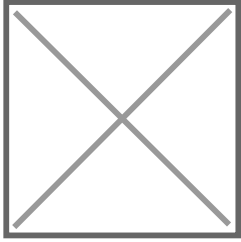
Icons defined

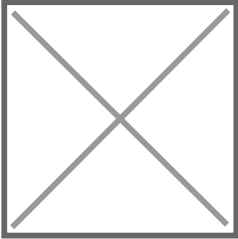
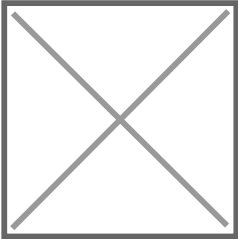
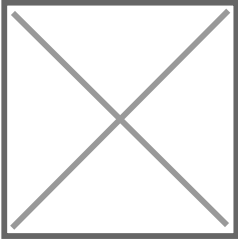
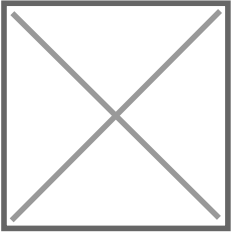
- [Icons defined](#)
- [Due Date Colours](#)
- [Debtors / Customers Setup](#)
- [Creditors / Suppliers Setup](#)
- [Invoice grid icons](#)
- [Sales Document Line items icons](#)
- [Sale Leads Icons](#)
- [Purchase Document item line icons](#)
- [Supplier Invoice Line Status](#)
- [Supplier Payment Status Icons](#)
- [Inventory Setup Icons](#)
- [Stock Request Status Icons](#)
- [Cashbook Allocation Colours](#)
- [Job Costing Status Icons](#)
- [Job Line Status Indicators](#)
- [Job lines Item Status](#)
- [Time Log Icons](#)
- [User Icon](#)
- [Lab Samples Search Icons defined](#)
- [Lab Tests search Icons defined](#)
- [Inventory Lab Status Icons](#)

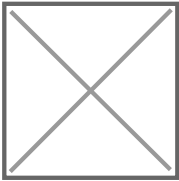
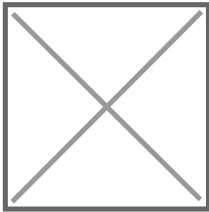
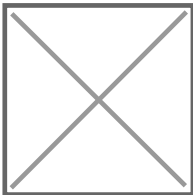
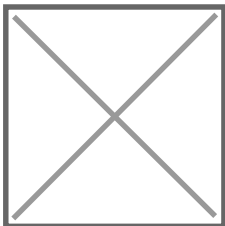
Icons defined

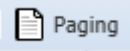
The system has various icons which allow one to understand what the button function will do.

Name	Icon	Display	Name	Definition
Print Menu drop down			print_menu.png	This defines our print drop down, which includes both, the printing and exporting button functions. When printing or exporting, you leave a footprint behind, which is why we selected this image to illustrate this
Process or Complete			process_arrow.png	Processing of any document into the system where it will allocate ledger and document numbers. This can be used in various places to show a complete of that stage.
Stock			stock.png	This icon shows stock and can be linked to inventory enquires
Search or Find			find.png	This button allows you to search. It can also indicate the presence of another window for more advanced searching
Manage tasks			jobmanage.png	The manage tasks icon indicates that the user needs to further manage this document. Examples include job costing or Bill of Materials (BOM)

Workflow			workflow.png	Allows one to bring up the workflow window to drag and drop tasks
Menu list expand			expand.png	The menu indicates that there are multiple other functions below this. When you click on the small downward arrow, it will open up more functions
Reminder create			reminder.png	Create a reminder for a task
Budget, Retentions			budget.png	Used for Budgets, progress invoices and retentions
Upload or Import			cloudupload.png	Indicates to upload a file to a database and in some cases import
Branches			branch.png	The branches icon shows that you can link branches to this area
Target			target.png	Setting up targets against a customer or supplier
Alerts			alert.png	Set up an alert against an area in the system

Contact			vcf_card.png	Create a sales lead, view a contact or import a VCF card
Approval option menu			approval.png	This icon indicates that there is an approval required or next step
Note header line			addnote.png	Adding a header line or note on a document
View a document			magnifier.png	Viewing the document or information
Serial number			serialno.png	View, import or add a serial number
Create a template			arrow_repeat	Create or convert to a template
Image view			image.png	View an image
Next Action			lightning.png	This indicates an action that will happen when the button is pushed

Warehouse			warehouse.png	An item is linked to a warehouse and min or max levels can be updated
Supplier			icon-suppliers.png	Shows something is linked to suppliers
Costs			cost.png	Indicates that a cost function is available
Change			cog_edit.png	When active allows one to change the value of the processed document
Close document			page_white_code_red.png	This icon indicates that one is closing the document
Support log			support.png	Create a support log
Sales lead			funnel.png	Create a sales lead
Status			status.png	Check the status of the printing and email
Barcode			barcode.png	Indicates that a barcode can be used
Percentage job invoice			percentage.png	Used in Job costing to indicate a percentage job invoice

Statistics			stats.png	An indicator to run statistics
Task to do			task.png	Requires a task for a user to do, can be used in reminders
Memo Notes				Memo note - there is no memo entered Pen and writing - there is a memo note entered
Paging and No Paging				This is used to remove paging to read 1 of 2 for example and to have a list of all invoices or any customer or supplier documents you are paging through. It is better used for viewing data or just paging through data in case you want to view it in alphabetical order If processing data, it is better done in 100 or you better not remove the paging so you can process your data fast. If you remove the paging and try to process this may cause the system to be slow

Due Date Colours

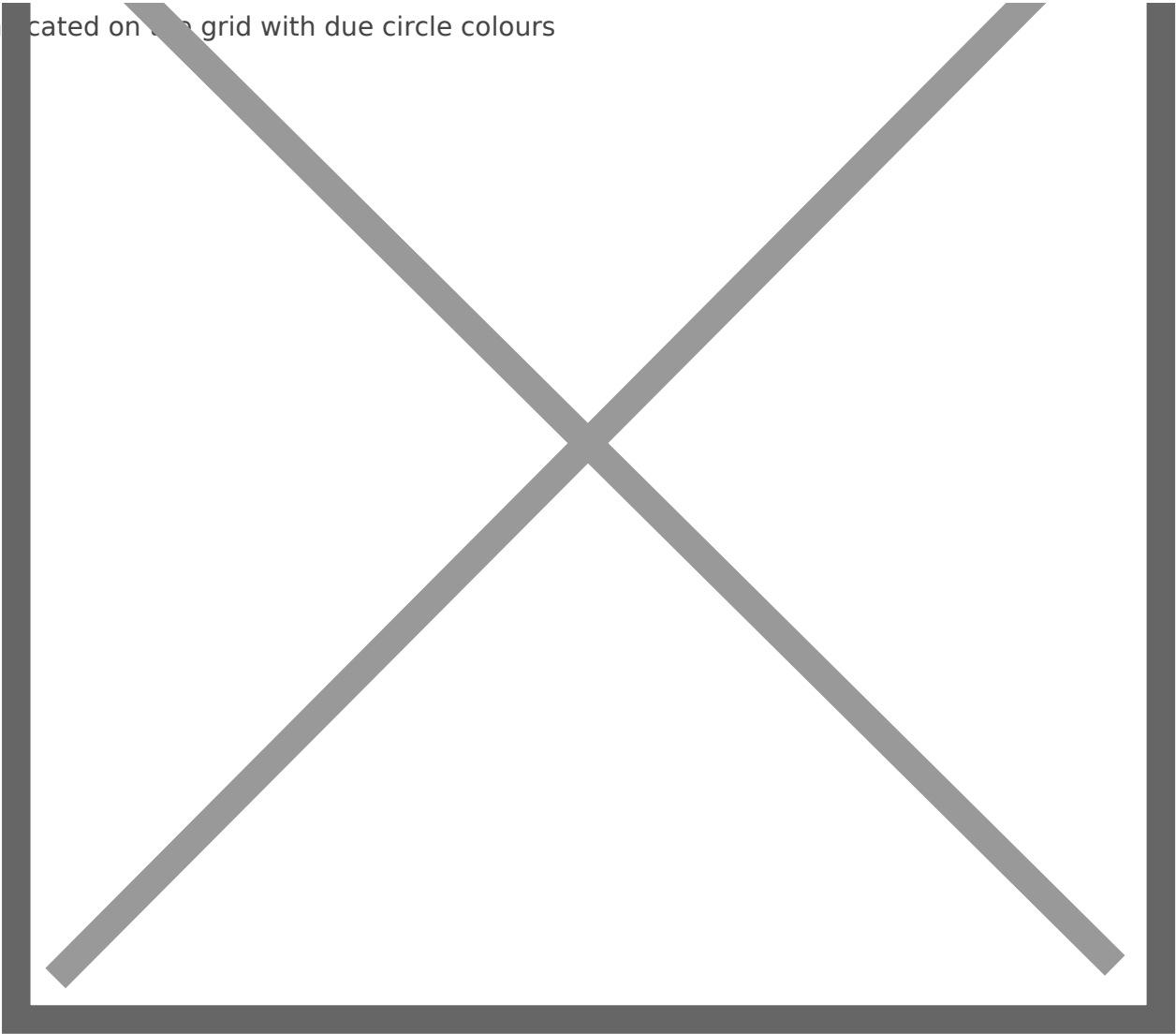
In various areas of the system, there are colour codes indicating over due or future dated transactions.

Or this can be an icon

Icon	Details
	Past 30 days from Due date based on current date
	Before 30 days from due date based on current date
	Past 7 days from the Due date based on current date
	Due date is on today's date
	Future 7 days from current date to due date
	Anything after 7 days up to 30 days in the future
	After 30 days in the future

Colour	Colour	Details
	Black	Past 30 days from Due date based on current date
	Red	Before 30 days from due date based on current date
	Yellow tag	Past 7 days from the Due date based on current date
	Blue	Due date is on today's date
	Green	Future 7 days from current date to due date
	Purple	Anything after 7 days up to 30 days in the future
	Grey	After 30 days in the future

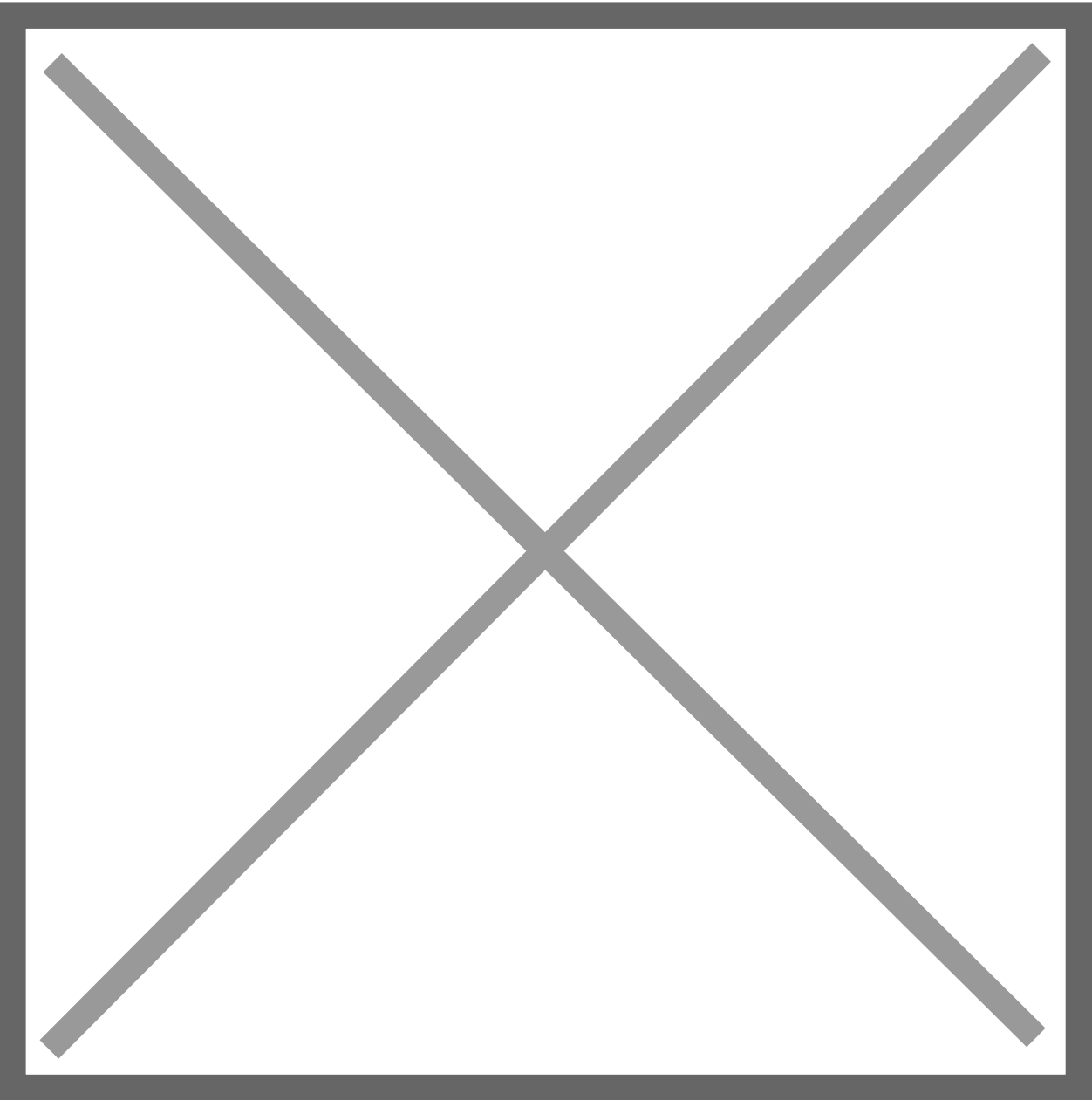
Indicated on the grid with due circle colours



Debtors / Customers Setup

When searching in the Debtors / Customer setup, the grid will display items with icons

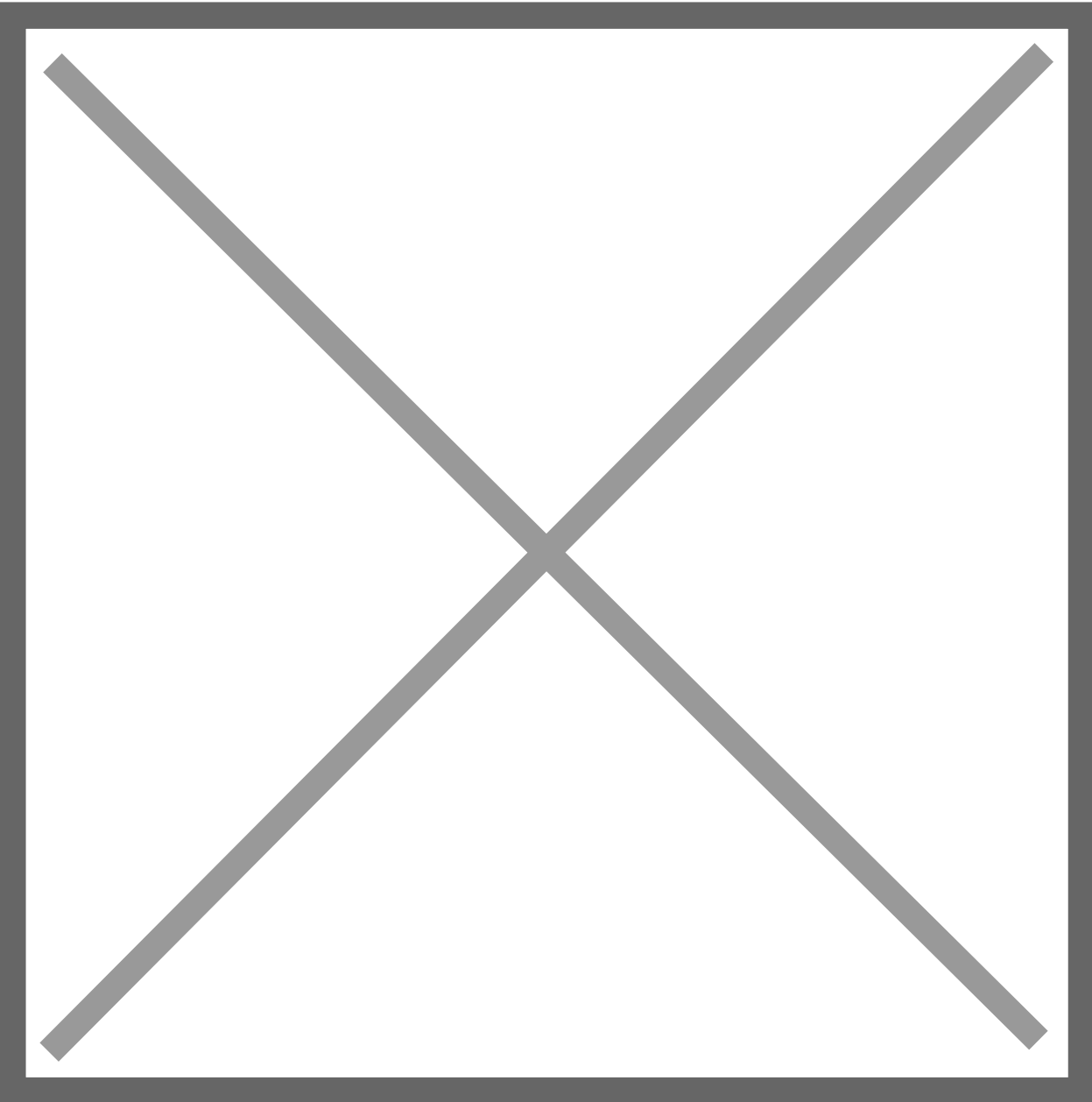
Icon	Details
	Customer Debtor is active
	Customer is marked as a Head Office
	The legal tick box is on where you are engaged with the client in a legal action
	Client is put on hold
	Credit limit is ticked and enforced
	Customer is marked as an intercompany client
	Customer is marked for interest charging
	Customer / Debtor is inactive
	This is a prospect
	The customer has a web address entered, clicking on this icon will open up a new window to the url



Creditors / Suppliers Setup

When searching in the Creditors / Supplier setup, the grid will display items with icons

Icon	Details
	Supplier is active
	The supplier is marked as a head office
	Clearing or Forwarding Agent
	Enforce Credit Limit
	The supplier is marked as an intercompany supplier
	The supplier is activated to charge interest
	On Hold
	Supplier is inactive



Invoice grid icons

Invoice grid displays the type of invoice is shown in the search grid

The following icons appear on sales documents

Icon	Details
	Recurring Invoice
	Part invoice ticked but not processed as Proforma Invoice
	Proforma Invoice
	On Hold
	Is Open (an invoice which was reopened)
	Preparation



There are two status columns

Invoice Search

Search | Add | Edit | Clone | Cancel | Process Invoice | Quick Process | Proforma Inv. Process

Basic Search

Custom Search

Expand

Debtors: L: ☐

Invoice Status:

Description:

Reference:

Date From:

Date To:

Order Number:

Sales Rep.:

Total Ex GST: 15 601.4200 Total GST: 2 340.2200 Total Inc GST:

Page of 1 Remove Paging: ☐ Import Invoice Document or Template

☐	#	Att	Memo	Status	Invoice Date	Invoice Status	Ship	Debtors Code	Debtors Name
☐	1				2024-02-22	Preparation		AIRBNB01	Air BNB 01
☐	2				2024-02-14	Preparation		ABC0010	ABC Company
☐	3				2024-01-25	Proforma Posted		ADV001	New custome1
☐	4				2024-01-09	Proforma Posted		ABC0010	ABC Company
☐	5				2023-06-12	Proforma Posted		ADV001	New custome1

Sales Document Line items icons

The following icons appear on sales documents

Icon	Details
	Item is on special linked to a deal (Only shows in quotes)
	RFQ and Drop Ship ticks are both activated
	RFQ is active
	Drop Ship is active
	Item has a line discount on it
	Item is selling below cost value
	Line item OK
	No stock

There are two status columns

LS = Line Status (this column only shows if the item does not have stock, there is no other icon status)

Status = Line status of item

Quote

[Quote Detail](#) |
 [Address](#) |
 [Extras](#) |
 [Link](#) |
 [Shipping](#) |
 [Action](#) |
 [D](#)

Quote Number:

QT242

Debtors:

ABC0010

Debtors Name:

ABC Company

Sales Rep:

Dealer

Quote Date:

2024-02-21

Valid Until Date:

2024-02-28

Delivery Date:

2024-02-28

Quote Status:

Preparation

Description:

Task detail

Reference:

Order Number:

Currency View:

Document Currency

Exchange Rate:

1

NZD - NZ Dolla

Comment:

Items

Page 1 of 1

[Add](#) |
 [Note](#) |
 [Edit](#) |
 [Delete](#) |
 [Quick](#) |
 [Dimer](#)

#	Seq. No	LS	Status	Type	Code	Description	Unit Sale	Total Selling Ex GS
1	1		●	Task	PC	Computer	686.38	3,431.89
2	2		\$	Stock	PEN001	Pen MG Stock	90.00	427.50
3	3	⚠	●	Stock	22249800301	PE35/8.795 ...	1.30	1.30
4	4		●	Custom	FLASH001	Flashing Di...	15.00	15.00

Sale Leads Icons

The sales leads icons are based on the stages of the sales lead

Icon	Details
	Stage0 - Account Management
	Stage1 - New Lead
	Stage2 - Identify and Qualify
	Stage3 - Analyse, Influence and Develop
	Stage4 - Proposal and Tender
	Stage5 - Negotiate and Win

Purchase Document item line icons

Purchase documents icons

The following icons appear on purchase documents

Icon	Details
	Item has a line discount
	Line has Job CTC (Cost to Company) activated
	Line has Job SC (Scope Creep) activated
	Line item OK



Purchase Order

 Attachments  Memo  Reminder  Terms And Conditions  Update Recurring  View Stock

Basic		Address		Extras		Shipping		Custom Fields		Scan	
PO Number:	PO125			Created	Description:						
Creditors:	THE001				Reference:	Created from SORD1					
Creditors Name:	The Supplier Co				Shipping Method:						
PO Date:	2024-03-05				Currency View:	Document Currency					
Acc Due Date:	2024-03-05				Exchange Rate:	1					
ETA Date:	2024-03-19				Job:						

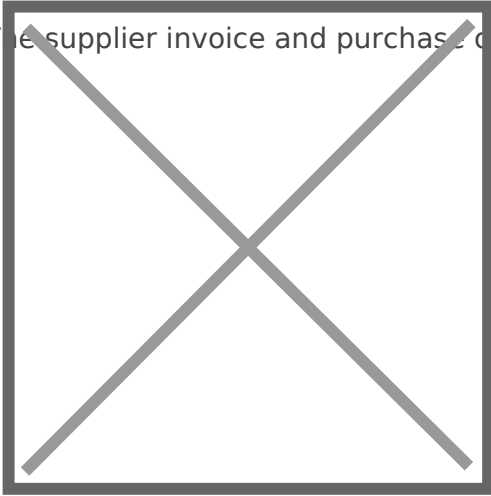
Items

  Page 1 of 1   Add  Edit  Delete  Import Items 

#		Seq.No	Image	Delivery Date	Stock Type	Creditors Item Code	Stock Code	Ite
1		0		2024-03-19	Stock	BAR 6M	BAR/RD/6M/L.A	Ba
2		1		2024-03-06	Custom		32907/25	Je
3		2		2024-03-06	Stock		PEN505	Ma
4		3		2024-03-19	Stock		B-HERIT-RED	He

Supplier Invoice Line Status

The supplier invoice and purchase order lines status



Green Circle = Standard lines on Supplier invoice and purchase order

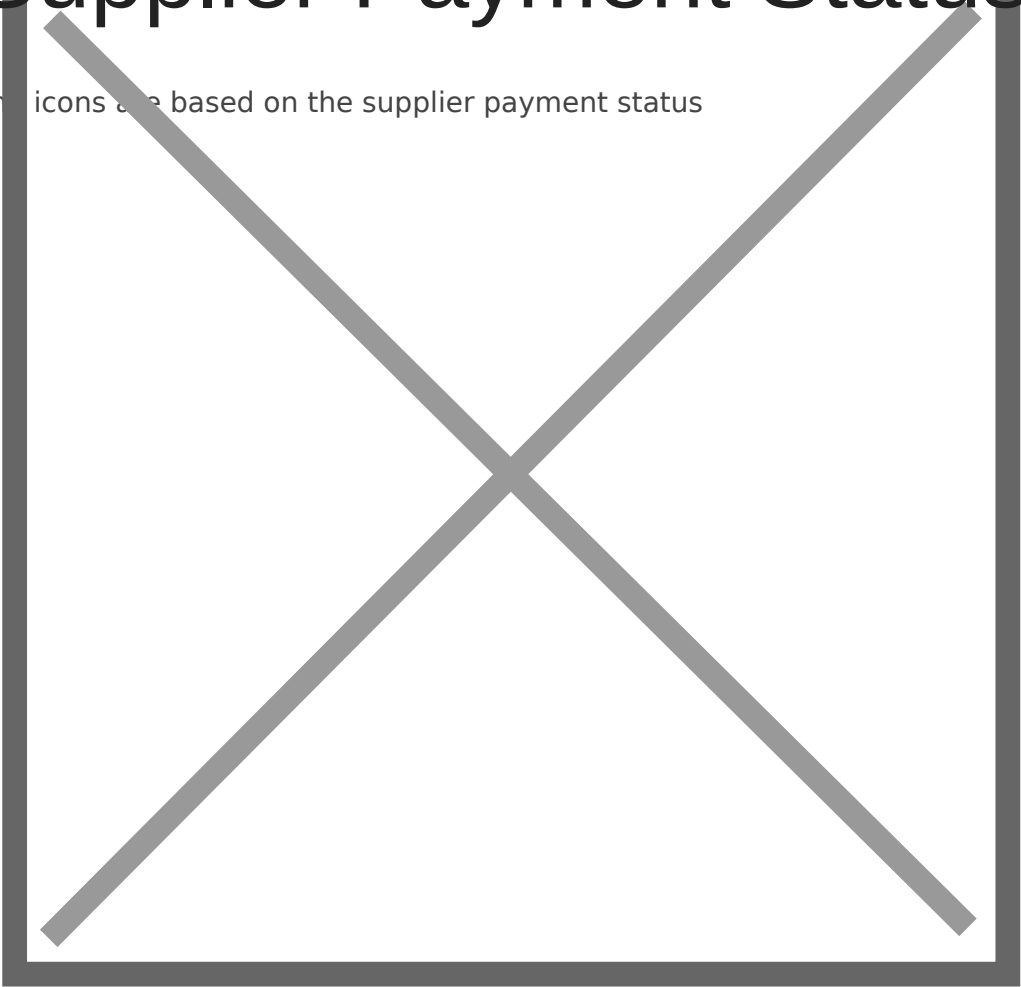
Red percentage = A percentage has been put against a line

Red Gear and Dollar = CTC (Cost To Company) tick allocated to line

Blue Gear and Dollar = SC (Scope Creep) tick allocated to line

Supplier Payment Status Icons

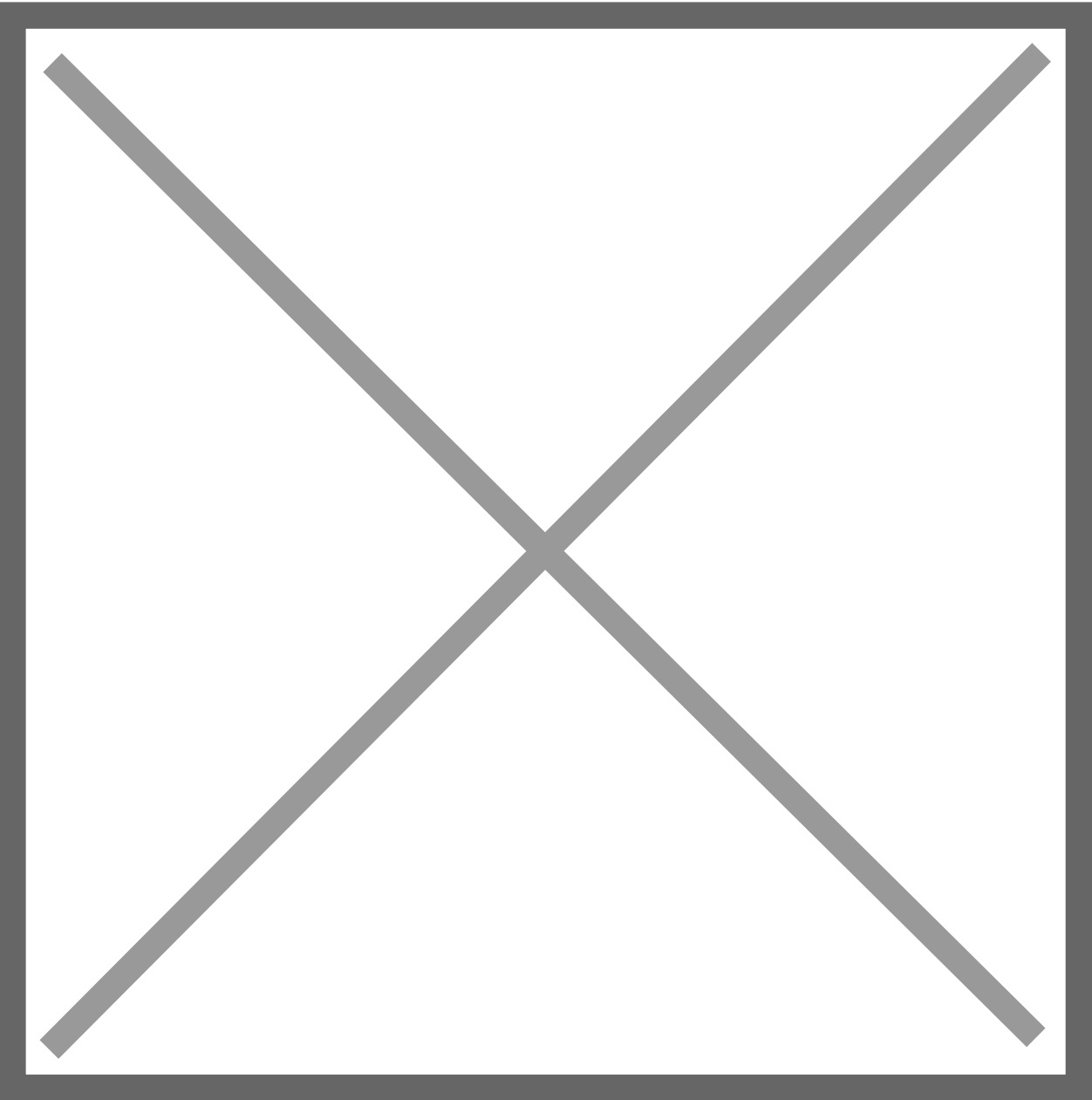
The icons are based on the supplier payment status



Inventory Setup Icons

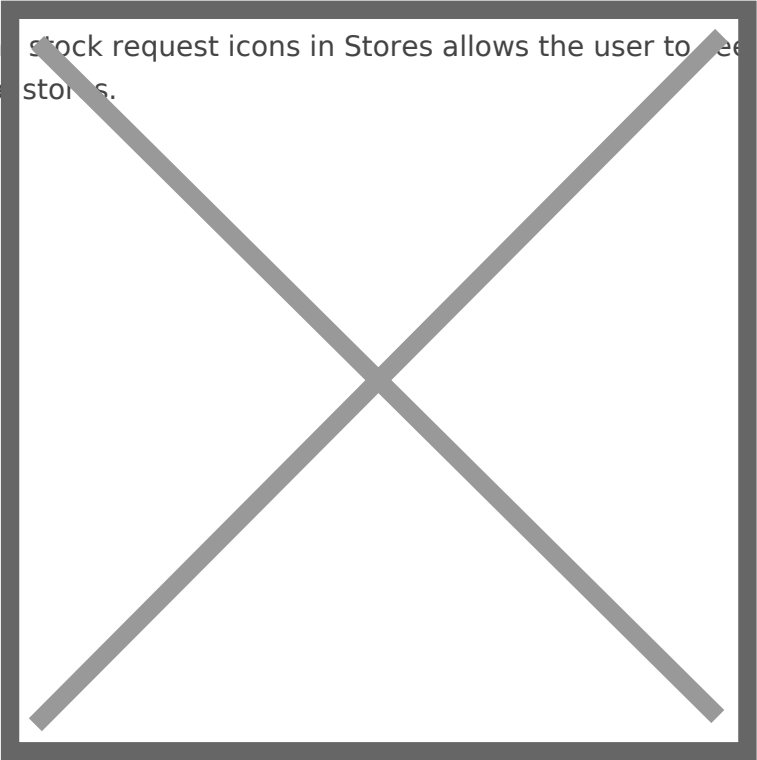
When searching in the inventory setup, the grid will display items with icons

Icon	Details
	Inventory item is active
	The item is marked as a Unit of Measure
	The item is a Unit of Measure with Sales and Purchases UOM selected
	The item is flagged as a serialised item
	The item is flagged as batch tracking
	The item is marked as a bill of materials
	The item is marked for Tag Tracking (RFID Tags)
	The item is marked as a bill of materials and serial number tracking
	The item is marked as a kit
	The item is a wastage item
	The item has a family tree structure
	The item is inactive
	The item is on an active lab test
	The item is on multiple lab tests
	The item is a fixed asset item



Stock Request Status Icons

The stock request icons in Stores allows the user to see at which stage the stock request is at in the stores.



Icon	Details
	Print Picking Slip
	Start Picking
	Collection Ready
	Confirm Quantity
	Partially Completed
	Completed

Cashbook Allocation Colours

In the cashbook when selecting allocate, the system will show the allocation type

Icon	Details
	No allocation has been applied to this cash book line
	The system was unable to allocate this line
	Line allocated - Match Payments
	Allocate Oldest amounts i.e. documents
	A balance remains on the cash book amount e.g. not all the money on the cash book has been allocated
	Manual allocation have been carried out on this cash book line. If Blue, Green or Yellow lines are manually allocated the button will change to purple

Indicated on the grid with due circle colours

Colour	Colour	Details
	Red	Unable to auto allocate
	Blue	Matched a payment amount with payment invoice
	Green	Allocated oldest to newest
	Purple	Manual allocation applied
	Grey	No allocations applied
	Yellow	Partially allocated

Match payments tick box which is on by default –

This will try and match an exact payment with an exact invoice amount.

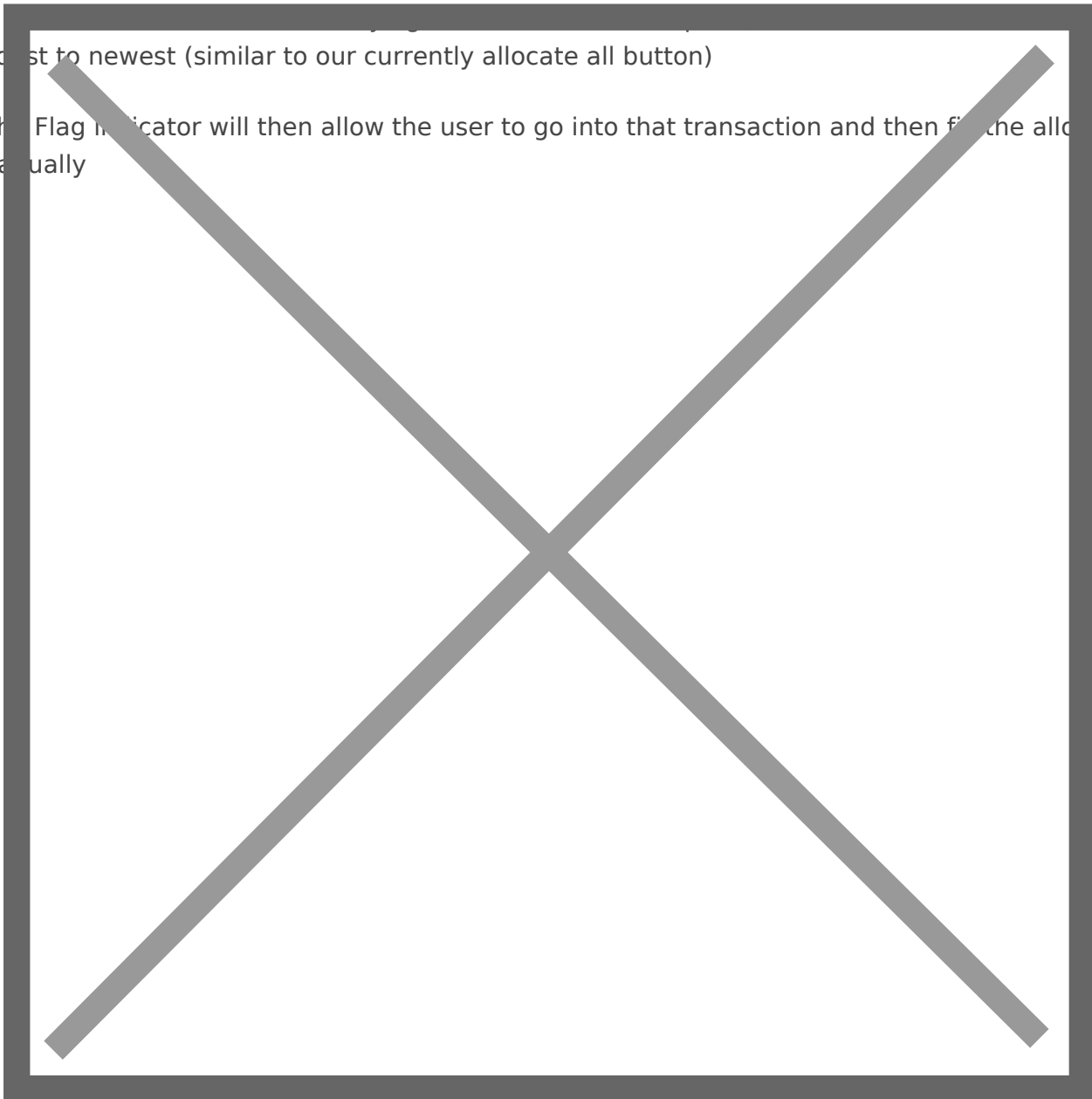
If not it will try and match a payment with invoices to balance exact. (will work if all allocations are up to date) meaning payment matches exactly the invoices outstanding and makes the balance equal zero.

Allocate oldest – (not everyone will use this option) so it is set as off by default

oldest to newest (similar to our currently allocate all button)

The Flag Indicator will then allow the user to go into that transaction and then find the allocation manually

allocate

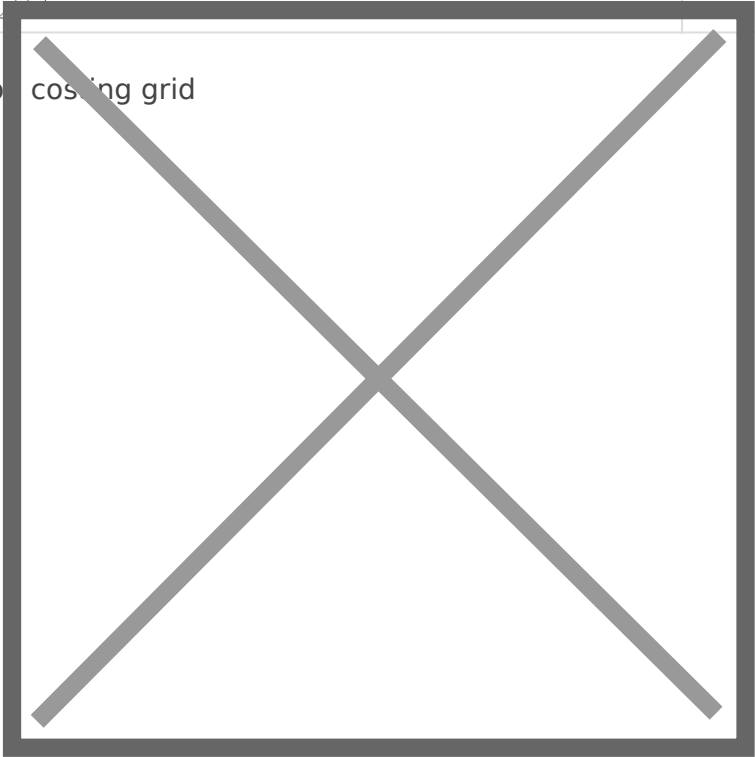


Job Costing Status Icons

Job costing has various job status icons to define where the job is

Icon	Details
	Not started job
	Start job - Items on the job are active and been managed Job has been forced to start without any lines been managed
	Started job which has been reopened
	Ready for invoice has been set for job
	Invoice is created and in preparation status
	Final invoice is created and in preparation status

Job costing grid



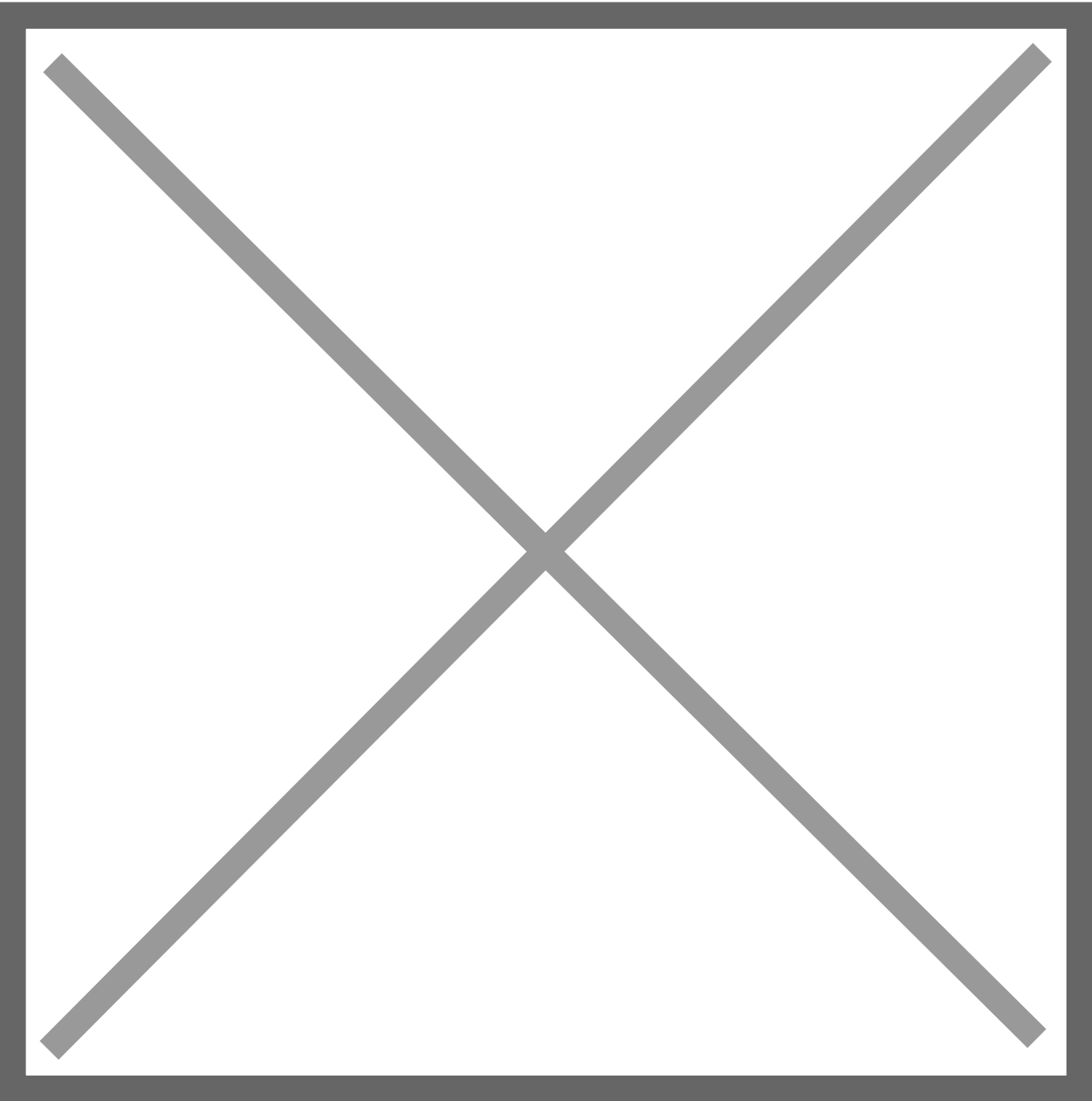
Job Line Status Indicators

Job Costing > Activity > Manage Job

Icon		Details
	Not Started	No lines allocated or no marked is complete
	In Progress	Line managed - Budget is greater than Actual
	Qty Reached	The line quantity balance has reached the budget versus actual and is equal
	Qty Exceeded	The line quantity has exceeded the Budget versus actual
	Is Complete	Marked with tick box completed

Status of line, colours

Not Started	No lines allocated or no marked is complete	RED
In Progress	Line managed	GREEN
Qty Reached	Means the line quantity balance has reached the budget versus actual	Blue with a tick
Qty Exceed	Means that the line quantity has exceeded the Budget versus actual	BLACK
Completed	Marked with tick box completed	Black tick



Job lines Item Status

Icons for Manage job lines and Job Lines

Icon	Details
	Stock Item
	Service Item
	Custom Item
	Fixed Asset
	The item is marked as a Unit of Measure
	The item is flagged as a serialised item
	The item is marked as a bill of materials
	The item is marked as a bill of materials and serial number tracking
	The item is marked as a kit
	The item is a wastage item

Icon indicates what type of item line it is

Manage Job

Search
 Memo
 Attachments
 Create Reminder
 Info
 Workflow
 Ready For Invoice
 Functions
 View Doc

Job Number: **JOB20**
 Debtors Name: **ABC Company**
 Days to Completion: **-1240**

Header

All Job Lines

- Stock
- Service
- Custom
- Tasks

Basic	Filter	Functions	Date Details	Address
JOB20	ABC0010	QT107	Short Description: Job progress	
Completed: 94%	-> 47%	☒	Reference: ref	
Charge Up (SC): ☐	Assembly: ☐	Order No: MG45		
Prepriced (CTC): ☐	Internal Job: ☐	Sales Rep: DEALER		
Sub Job Link:	Status/Position:			
Comment:	Asset Item:			

Manage

Sales Docs

Purchase Docs

Scheduling

Job Lines

Planned Time

Job Line History

Sub Job Link

BOM Links

Notes

Page 1 of 1

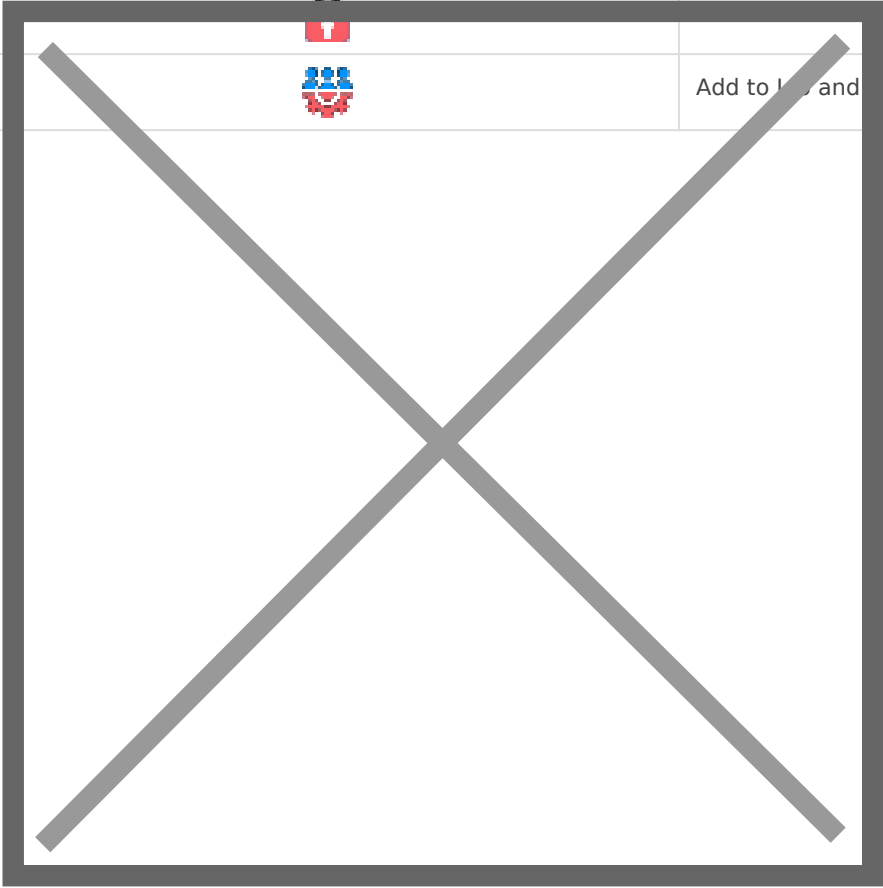
 Remove Paging: ☐ 1
 Manage line
 A Cost To Company
 B Scope Creep
 C Quote

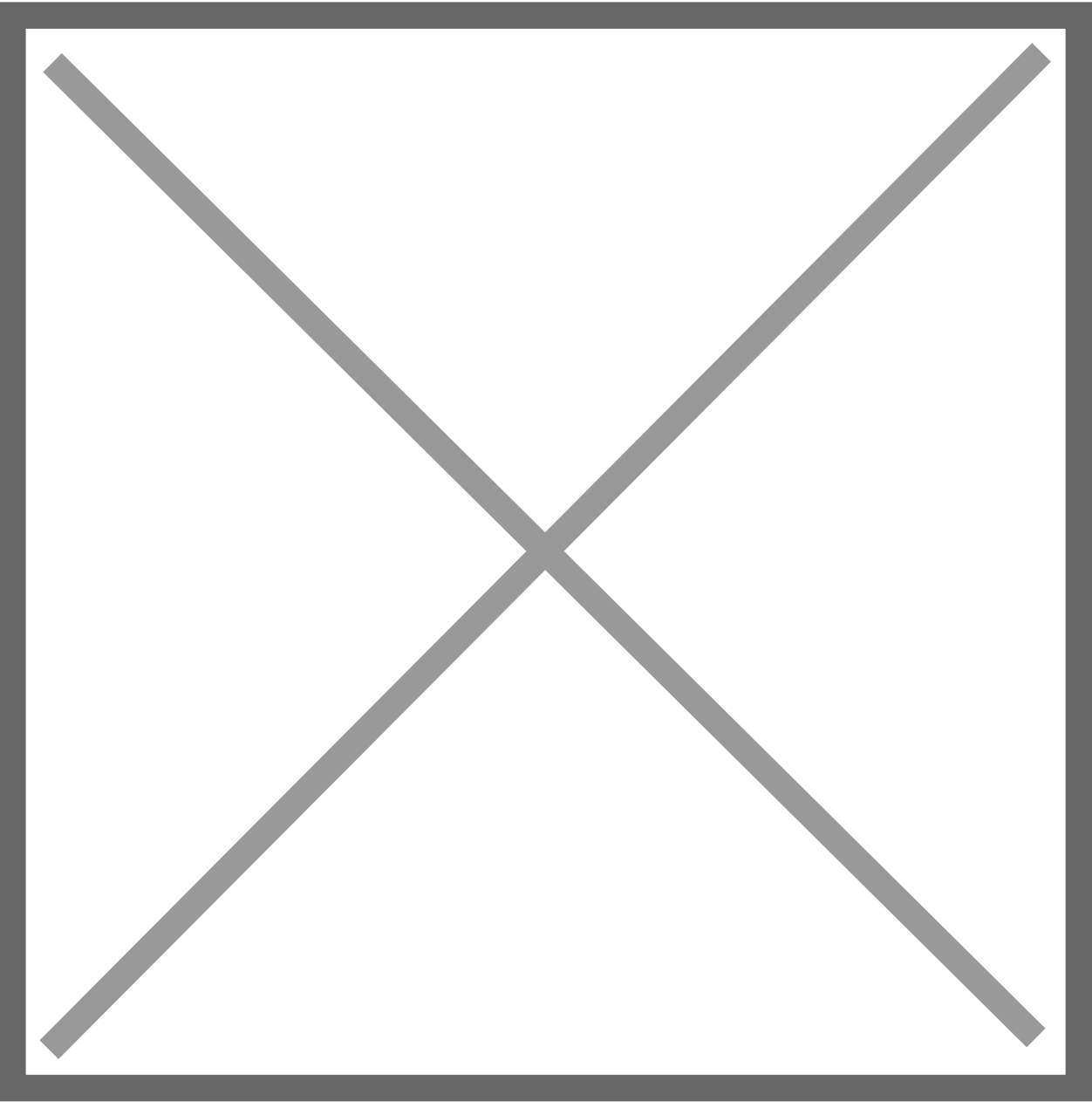
#	To Inv	Item Status	Related To	Notes	Line Type	Task Code	QT No	B-Status	J-Status	Unit Sell	Days Re
1		Stock		Quote	QT107					1300	-1247
2		Custom		Quote	QT107					10	-1247
3		Service		Quote	QT107					80	-1247
4		Stock		SC						26	-1

Time Log Icons

When searching in the Time logs, the grid will display items with icons

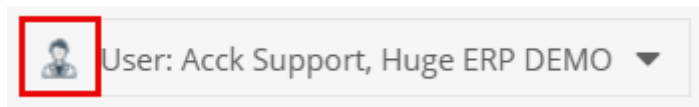
Icon	Details
	Non Billable - clock orange
	Time Log - clock blue
	Add to Job - clock purple
	Locked for Invoice - Invoice
	Job Completed / Completed - Lock red
	Add to Job and Job added to Job are ticked - Manage job red





User Icon

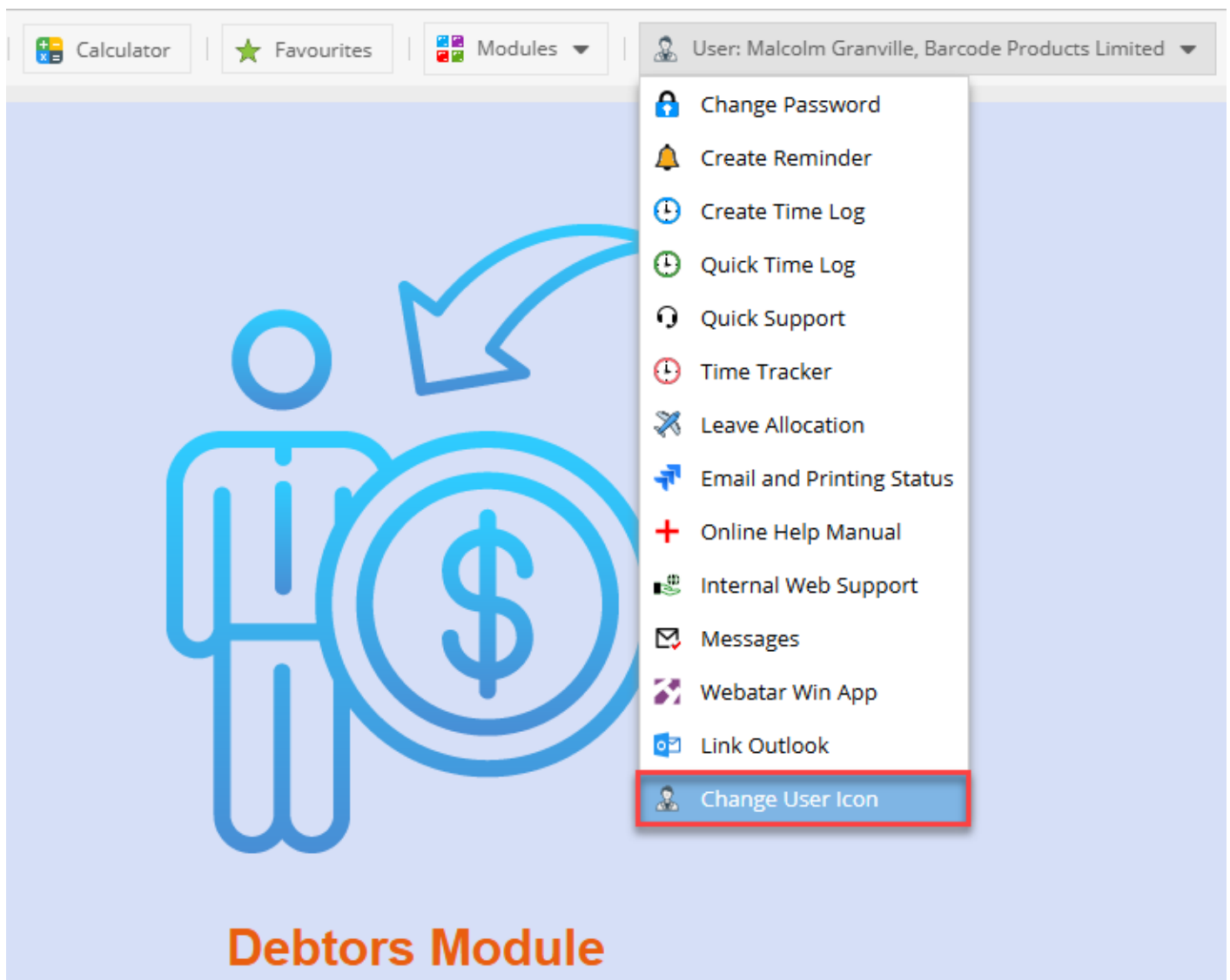
Change the User Icon



In any module at the top right of your screen, you will see your user icon.

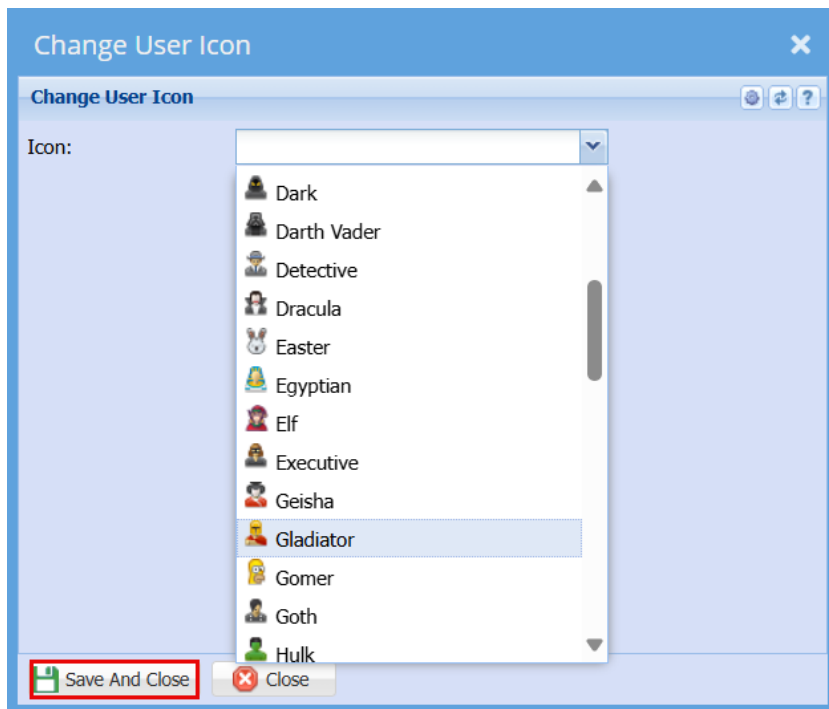
Click the drop-down arrow

At the bottom click "Change User Icon"



Select an item from the drop-down menu

Click Save and Close



Lab Samples Search Icons defined

Search icons defined for Sample Status

Icon	Status Detail
	Requested
	Received
	In Progress
	Completed
	Cancelled
	Closed

Icons are based on the sample status

Sample search

Search

New Sample

Add

Edit

Print Grid

Export

Sample Import / Export

General

Expand

Sample No:

Description:

Item:

Status:

All

Date Filter:

Sample Date

Date From:

2025-10-01

Date To:

2026-04

Order No:

Application No:

Debtor:

Priority:

All

Page 1 of 1

Remove Paging:

#	Att	Memo	Info	Status	Due	Priority	Sample No	Requested By	Status
1							SM158	Peter Smit	Requested
2							SM157	Barnaby Tudsbu...	Received
3							SM156	Peter Smit	In progress
4							SM155	Peter Smit	In progress
5							SM154	Peter Smit	Requested

Lab Tests search Icons defined

Icons defined for test progress

Icon	Detail
	Created
	Started
	In Progress
	Test Done
	Checked
	Retest
	Certificate Issued
	Published
	Cancelled
	Closed
	Re-Opened

Test icons are managed by the status of the test

Sample

 Attachments  Memo  Create Reminder  Info  Certificate  Print Barcode

General

Address

Tests

Results

Logs

 Search  Print

Test No:

Test Description:

Test Status:

Open and Published

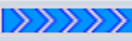
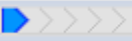
Test Template:

Total Tests
7

Published
1

Total Value
0

Page 1 of 1  Add  Edit 

#	Att	Info	Status	Status	Progress	Due	Due Date	Date	Test No
1				Checked			2026-03-01	2026-04-30	SM155.7
2				Created			2026-05-30	2026-04-30	SM155.4
3				In Progress			2026-05-30	2026-04-30	SM155.6
4				Publish			2026-03-26	2026-02-24	SM155.2
5				Retest			2026-03-01	2026-01-30	SM155.1
6				Started			2026-05-30	2026-04-30	SM155.5
7				Test Done			2026-04-02	2026-03-03	SM155.3

Inventory Lab Status Icons

These icons inform the user whether a test sample was submitted to the lab.

No Icon	No test has been done on this item
	One active test submitted
	Two active tests submitted
	Three active tests submitted
	Test completed within 6 months
	Test completed greater than 6 months but less than a year
	Test completed more than 1 year ago

Icons do not automatically update when searching the grid.

Icons are updated as follows:

1. When editing a stock item and saving
2. Manually running the function to update test icons
3. Setup an automatic task to update icons every day

Inventory Setup

Search Add Edit Clone Delete Inventory Overview View Image Serial No. Options Functions Print

Basic Search Custom Search Expand

Item Code: Item Description:

Barcode: Supplier Item Code:

Group Code: Supplier Name:

Order By: Stock Code Category: All

Active: ☒ BOM Items: ☐ Serialised Items: ☐

Total Stock **691** Total Custom **88** Total Service **43** Fixed Assets **15** Total BOM **44**

Main Cost Price Supplier Cost Price Stock Available Serial Numbers

Page 1 of 9 Remove Paging: ☐

#	Att	Memo	Status	Code	Description	Lab	Default Selling Price	Category	Qty On Hand
1				04-01/3220902	Downpipe 3.2m 80mm Grey Friar		50.0000	Stock	725.123
2				16-01/RPLTOUPAI015GFE	Paint Touch-up 15ml Grey Friar		40.0000	Stock	
3				18-01/RMTAABL513P	Rivet Black/Ebony		0.0400	Stock	
4				04-01/3220921	Downpipe 3.2m 80mm Slate		50.0000	Stock	74
5				04-01/32209NN	Downpipe 3.2m 80mm Thunder Green...		50.0000	Stock	395
6				04-01/3226304	Downpipe 3.2m 80mm Black		50.0000	Stock	5
7				04-01/3226308	Downpipe 3.2m 80mm Ironsand		50.0000	Stock	1
8				04-01/3226309	Downpipe 3.2m 80mm Karaka		50.0000	Stock	6

Manually update the icons through Functions menu

This will update all items with the icon

Inventory Setup

Search Add Edit Clone Delete Inventory Overview View Image Serial No. Options Functions Print Imp

Basic Search Custom Search Expand

Item Code: Item Description:

Barcode: Supplier Item Code:

Group Code: Supplier Name:

Order By: Stock Code Category: All

Active: ☒ BOM Items: ☐ Serialised Items: ☐

Total Stock **691** Total Custom **88** Total Service **43** Fixed Assets **15** Total BOM **44**

Main Cost Price Supplier Cost Price Stock Available Serial Numbers

Page 1 of 9 Remove Paging: ☐

Functions

- Alerts
- Update Mark-up %
- Update Items
- Update Bulk Web Shop
- Update Stock levels on Web Shop
- Add Pricing Level Currency
- Mobile Sync Activate All
- Mobile Sync Deactivate All
- Check Linked Open Docs
- Update Predicted & Facts
- Update Lab Test Status

#	Att	Memo	Status	Code	Description	Lab	Default Selling Price	Category	Qty On Hand	
1				04-01/3220902	Downpipe 3.2m 80mm Grey Friar		50.0000	Stock	725.123	Yes
2				16-01/RPLTOUPAI015GFE	Paint Touch-up 15ml Grey Friar		40.0000	Stock		Yes
3				18-01/RMTAABL513P	Rivet Black/Ebony		0.0400	Stock		Yes
4				04-01/3220921	Downpipe 3.2m 80mm Slate		50.0000	Stock	74	Yes
5				04-01/32209NN	Downpipe 3.2m 80mm Thunder Green...		50.0000	Stock	395	Yes
6				04-01/3226304	Downpipe 3.2m 80mm Black		50.0000	Stock	5	Yes
7				04-01/3226308	Downpipe 3.2m 80mm Ironsand		50.0000	Stock	1	Yes