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From: **Sean Carlton** <[seancarlton@me.com](mailto:seancarlton@me.com)>  
Date: Mon, Oct 10, 2022 at 2:47 PM  
Subject: SilverState Rubber - Peggy Stone  
To: Steve Berkenkotter <[steve@adilas.biz](mailto:steve@adilas.biz)>, Brandon Moore <[brandon@adilas.biz](mailto:brandon@adilas.biz)>

Good afternoon Brandon and Steve.

I know that we talked a little bit about Peggy’s system, and it looks like she might have some Custom stuff, as far as her “Limited Format Invoice”. With there already being a Custom one set up, this might be even easier, than I thought it would be, but that could be exact opposite, for all I know.

Here is kind of a list of “small” changes that she would appreciate, as well as some operational stuff she noticed, that might be a glitch.

* Their “Limited Format Invoice” is called “Work Order - Packing List”
  + I could be mistaken, but I think her columns had Status, Quantity, Items, Bin, and Description, whereas it seems like the Default has UofM, instead of Bin
  + They want to maintain the Column that currently says “Bin”, and utilizes the Bin field of the Parent Item, but they want the Column Header to read “Qty Per Box”
  + The Bin Field of the Parent Items are where they input the Case Size, or the Qty Per Box
  + They want the same field to be used, but just the Column Name to be changed
* Peggy also stated that they some times “pull” or “fill” the order, based off of the Quote, before an Invoice has been created.
  + Is it possible to wire her same exact “Work Order - Packing List”, or her “Limited Format Invoice”, to also be viewable and printable from the Quote Home-More Options?
    - I know that the Quote is treated differently than Invoices, in most areas, but she was just inquiring as to whether she could print a “Limited Format Quote”, the same way that they currently print the “Limited Format Invoice”
* I also noticed that they are still using “Active” Inventory, as opposed to Parent/Child Inventory
  + She says that Kelly had showed her and spoken to her about Parent/Child Inventory, a few years ago, but there was a specific reason that Kelly did not switch her over, but Peggy can’t remember the reason. She think it had something to do with the exporting of data?
  + Peggy’s costs were probably always very consistent, so this might be why Kelly didn’t want to switch her over, but in the last few Months, she has been seeing MAJOR Cost increases, specifically with Freight, which she rolls into each Item’s Cost.
  + Should I send an email to Kelly, asking her the reasons for not switching Silver State from Active to Allow Subs Only?
* Peggy also mentioned that some of the Reports that she exports, can show up weird in Excel, and not have the ability to Sort certain Columns
  + She seems to use the EOT, and the Advanced Search of EOT, quite a bit, and exports those results into Excel
  + After playing around with the export into Excel, she might have to combine some multiple Columns into one, before trying to Sort the Column
  + She said this is not the only Export to Excel, that she has noticed weird Columns and the lack of Sortability, but it was the one she showed me

These were a few of the requests that she has wondered about, as well as some weird functionality, when exporting to Excel.

I hope that we are able to give her a couple of the “lighter lifts”, if there are any of those.

Thanks to both of you, and we can talk about some of this, next time.

Sean