



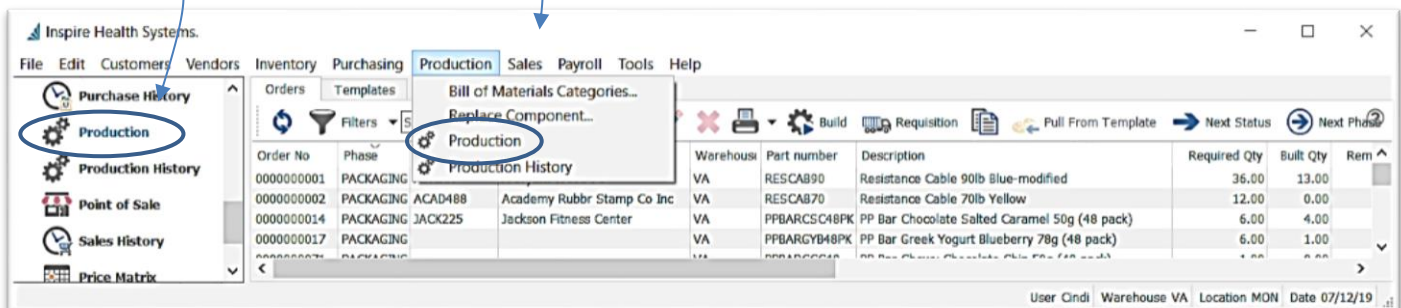
# CHAPTER 17 PRODUCTION MANAGER


The Production Manager add-on lets you control inventory with pinpoint accuracy, reduce unplanned expenses and improve cash flow. Efficiently plan production from beginning to end and track progress with real-time information on raw materials, costs and production status.

## Production Order List

### ■ Access




- ◆ Production text menu
- ◆ Module List > Production

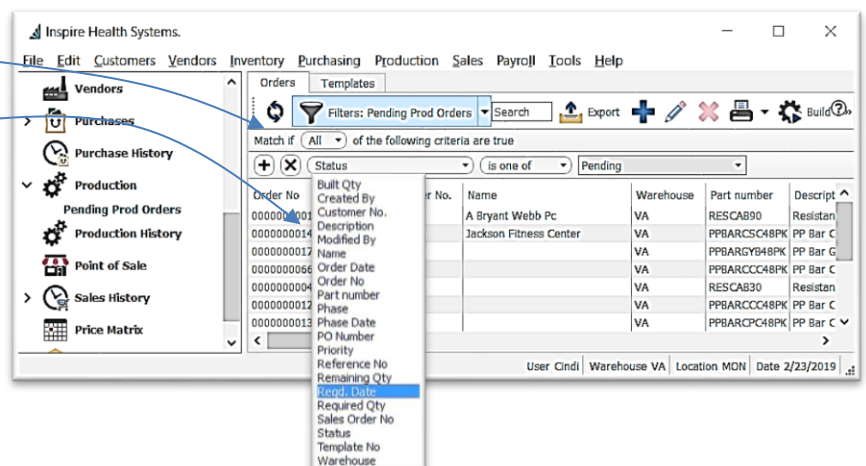


-  **Refresh** - load any new Production Orders that may have been created by another user since the last time data has been refreshed and that may not be displayed

### ■ Production Order List Customization

- ◆  **Filters** - create a filter for this list

- ⊕ click  **Filters**
- ⊕ choose **Any** or **All** selector
- ⊕ select from the list of fields to set the criteria
- ⊕ select from the operators ie: 'is one of', 'is not', 'Next x days', etc - this operators list changes based on the field selected in the previous step
- ⊕ enter the criteria information (ie: 'Pending')
- ⊕ if desired click  to add a line of criteria
- ⊕ to remove the criteria line click 
- ⊕ make any column adjustments (see Column Customization page 2)





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- select **Filters** for save options
  - Save default** - this filter will be active whenever viewing Production Orders
  - Save preset** - will load this Filter when the Filter button is on
  - Save preset as...** will allow you to name the Filter with the following settings:

- give this filter a name
- select **User** if this filter it will be used just for this User
- select **Company** if it is to be accessed by all users accessing this Company data
- ☒ **Show in module list** to display beneath the module
- ☒ **Save column state** if you have removed or added columns, or have sorted the list by one of the columns
- click **OK**

- click on the **Filters** button to release the current filter to see entire list or start a new filter

- Search** - type any character(s) into the field and the list will narrow to only records containing the character(s) typed, somewhere in the details

- open a Production Order to use the **Navigate** buttons **K** **<** **>** **X** to page through Production Orders in the list, filtered or not filtered, in order of the current column sort

## Column Customization

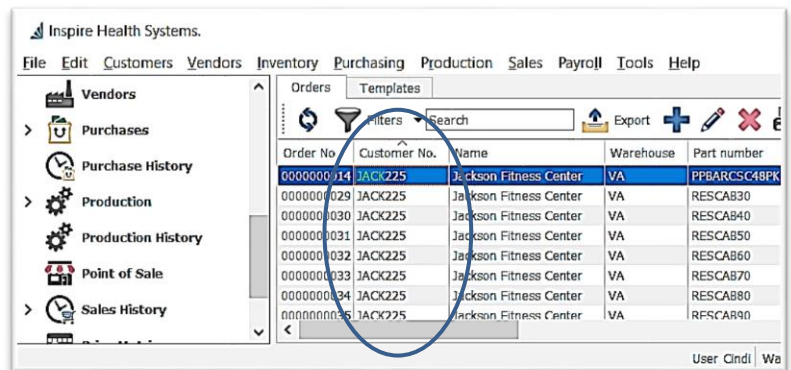
- drag and drop columns for preferred positioning
- right-click on any column heading to list to identify which columns you wish to see in the grid

- Column Sort** - click on any column heading to sort the list by that column



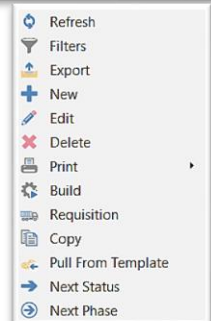
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- ✦ further narrow your search by just typing (you will see the typed letters turn green) and the list will highlight the closest match, in currently sorted column
  - \* note \* this also searches Components



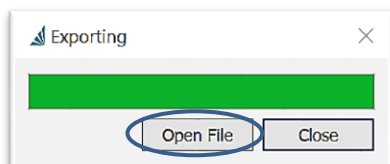
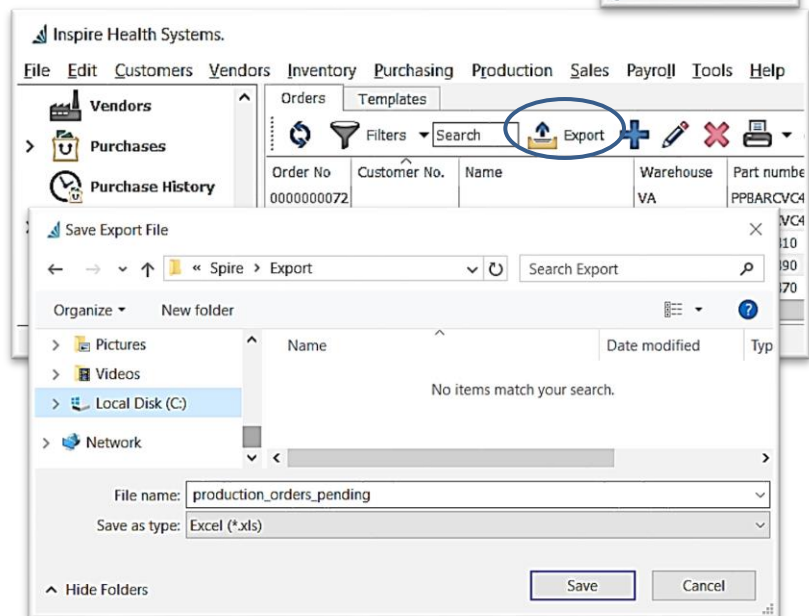
## Icon Menu Customization

- ✦ hover over the Icon Group handle until you see
- ✦ drag the Icon Group to where you want it



- Production Order List **Context Menu** - right-click any line to display
- **Export Production Order List** in your filtered or un-filtered list in Excel (.xlsx only) or CSV type

- ✦ will export the Production Order List visible, with the current column layout and sort order
- ✦ click **Export**
- ✦ choose the location **File name**, and **Save as type** it is to be saved in
- ✦ **Save**
- ✦ option to **Open File** right away
- ✦ from excel, make any changes or build any desired formulas





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## + Add New Production Order in one of 3 ways:

### 1. Add New Production Order Manually:

- ◆ from the Production Order List > **Orders** tab click + **New**

Production Order - 000000012 [Inspire Health Systems]

Build No: 000000012, Status: Pending, Reference No: , Order Date: 09/16/15, Required Date: 11/20/15, Priority: Normal, Customer PO:

Details:

Inventory	Description	Quantity	Built Qty	Remaining Qty	Extended Qty	Unit Cost	Extended Cost	UOM	Conv. Factor	Inv. Usage	Le
VA /PPBARCCC48PKA	PP Bar Chewy Chocolate Chip 50g (48 ...	1.00000	0.00000	1.00000	1.00000	491.29125	491.29125	PK			
VA /YOGURICOATING	High Protein Yogurt Coating	200.00000	0.00000	200.00000	200.00000	0.48720	97.44000	GM	1 GM per ...	200.00	
VA /ACAI	Acai Fruit Extract	50.00000	0.00000	50.00000	50.00000	1.00000	50.00000	GM	1 GM per ...	50.00	
VA /BRNSUG	Brown Sugar	100.00000	0.00000	100.00000	100.00000	0.06000	6.00000	GM	1 GM per ...	100.00	
VA /NONFATMILK	Nonfat Milk	12.00000	0.00000	12.00000	12.00000	0.88000	10.56000	GM	1 GM per ...	12.00	
VA /ALMONDS	Almonds	150.00000	0.00000	150.00000	150.00000	0.45000	67.50000	GM	1 GM per ...	150.00	

Production Order Notes: , Instructions:

Can Build: 0.000, On Hand: 9.000, Committed: 0.000, Back Ordered: 10.000, On Order: 11.000

Created by SS on 09/16/15 2:52:26 AM Modified by SS on 09/09/16 5:26:26 AM Total Cost: 491.29125 Unit Cost: 491.29125

- ◆ **Build No** is displayed, the sequence for which is established in Company Settings > Sequence Numbers > Production Orders tab
- ◆ option to enter or browse for a related **Sales Order** if this is a Sales Order-specific Production Order (see also Add New Production Order from a Requisition from a Sales Order page 13)
- ◆ **Phase** is an optional process monitoring system used to label orders internally, with option to set each Phase to automatically print a pre-determined form(s) and move to a Next Phase, as pre-determined in the Phases setup (also maintained under Edit > Phases), and option to set default start Phase for new Production Orders, by User (Edit > User Settings > Production Orders > Default Phase)
  - + once a phase is established, it will appear in the list, for use in filters and searches

Phases

Phase	Description	Type	Next Phase	Report
BUILD	Build	Production Order	PICKING	
PACKAGING	Packaging	Production Order		
PICKING	Picking	Production Order	PACKAGING	

Production Orders

Order No	Phase	Customer No.	Name	Warehouse
0000000001	PACKAGING	AR885	A Bryant Webb Pc	VA
0000000002	PACKAGING	AAAD488	Academy Rubbr Stamp Co Inc	VA
0000000004	PACKAGING	JACK225	Jackson Fitness Center	VA
0000000007	PACKAGING			VA
0000000062	1			VA
0000000063	1			VA

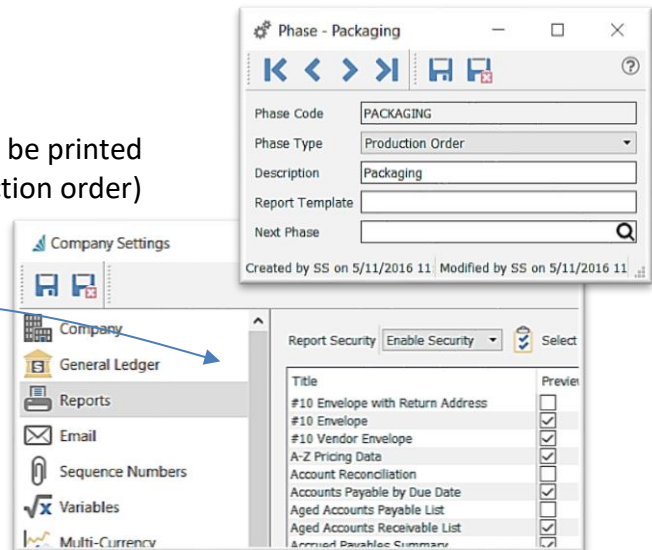




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## + New Phase

- enter **Phase Code**
- accept Production Order **Phase Type**
- enter **Description**
- options to select a **Report Template** to be printed when this Phase is assigned (ie: production order)
  - ▲ identify Report Names in Edit > Company Settings > Reports > Title
- assign the **Next Phase** - for use with the **Next Phase** function from the Production Order list or from inside the Production Order, to advance to the Phase determined here



- + **Refresh Phases**- bring in any new data that may have been entered by another user since you have had this module open or since the last time data has been refreshed

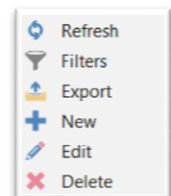
- + **Filter / Search / Customize Phases List** - see **Production Order List Customization**, page 1

- + **Phases Context Menu** - right-click on selected line(s) in the list to display

- + **Export** Phases list in Excel or CSV format - see **Export**, page 3

- + **Edit** Phase selected.

- + **Delete** Phase selected



- ◆ option to enter or **Q** browse for a **Phase Date** for the Phase assignment
- ◆ option to enter or **Q** browse for a related **Customer** for a Customer-specific Production Order (see also Add New Production Order from a Sales Order page 13)
- ◆ accept the **Order Date** or change by entering or **Q** browsing
- ◆ enter or **Q** browse for the **Required Date**, which is used to determine order times for raw materials
  - + once the Production Order is change to 'Pending' or 'In Progress' status, this date will show as the **Due Date** in the Inventory Item General tab, Purchasing section
- ◆ **Status** selection
  - + **Open** - ready to process, inventory items are not yet committed
  - + **Pending** - waiting for go-ahead, inventory items are committed
  - + **In Progress** - production has started, inventory items are committed
- ◆ option to enter a **Ref No** of your choice and significance
- ◆ **Priority** selection - for filtering, sorting and reporting purposes
- ◆ enter **Customer PO** if this is a Customer-specific Production Order (see also Add New Production Order from a Sales Order page 13)

