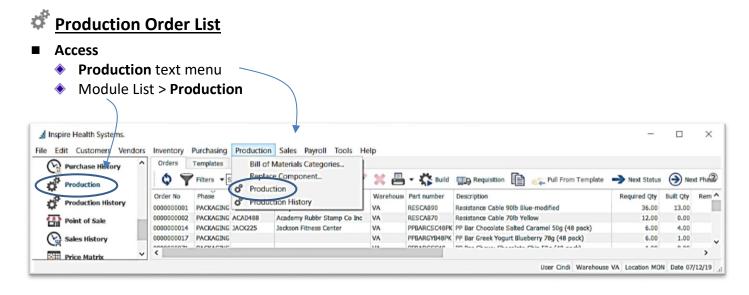
▲Spire User Manual

version 3.5 - volume 2 of 2

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.



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

A Inspire Health Systems

Production Order List Customization

- **Filters** create a filter for this list
 - click T 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')
- Edit Customers Vendors Inventory Purchasing Production Sales Payroll Tools Help Orders Templates 🔇 🍸 Filters: Pending Prod Orders 🔻 Search 🔮 Export 🕂 🥢 💥 📇 🗸 🖏 Build 🖏 10 Match if All

 of the following criteria are true Purchase History + X Status (is one of Pending Production Name Part number No. Warehouse Pending Prod Orders A Bryant Webb Pc RESCAB90 VA Production History lacks on Fitness Cen VA PPBARCSC48PK PP Bar C PPBARGYB48PK PP Bar G 0000000017 N VA Point of Sale 000000066 Order Date PPBARCCC48PK PP Bar C VA Order No 0000000004 VA RESCAB30 Resistan Sales History 0000000004 Part number 0000000012 Phase PPBARCCC48PK PP Bar C VA 0000000012 Phase 0000000013 Phase Date C PO Number VA PPBARCPC48PK PP Bar C V Price Matrix Priority Reference N User Cindi Warehouse VA Location MON Date 2/23/2019 Remaining Qty Required Qty Sales Order No Status Template No Warehouse
- if desired click to add a line of criteria to remove the criteria line click 🔀 Φ
- make any column adjustments (see Column Customization page 2)

×

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Spire User Manual

version 3.5 - volume 2 of 2



CHAPTER 17 production manager

- ◆ 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:

তি

 \bigcirc

Production

盈

> 🕞 Sales History

Pending Prod Order

oint of Sale

Price Matrix

- ★ 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

vill	Enter filter name ? ×	Remove default Save preset Save preset as
e	Pending Prod Orders	Delete "Pending Prod Orders"
ng	User Company Show in module list Save column state	Pending Prod Orders
	OK Cancel	
Syste		- 0
mers	Vendors Inventory Purchasing Production Sales Payroll Orders Templates	<u>T</u> ools <u>H</u> elp
	Filters: Pending Prod Orders V Search	🗌 📤 Export 💠 🥢 💥 📇 - 🏠

) (is one of

A Bryant Webb Pc

Jackson Fitness Cente

Name

Match if (All ·) of the following criteria are true

Customer No.

ARR885

JACK225

+ X Status

0000000001 Pending

0000000014 Pending

0000000017 Pending

000000066 Pending

0000000004 Pending

0000000012 Pending

0000000013 Pending

Status

Order No

Filters: Pending Prod Orders - Sear

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Build ?

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Part number

PPBARCSC48PK PP Bar C

PPBARGYB48PK PP Bar G

PPBARCCC48PK PP Bar C

PPBARCCC48PK PP Bar C

PPBARCPC48PK PP Bar C

RESCAROO

RESCAB30

Warehouse

VA

VA

VA

VA

VA

User Cindi Warehouse VA Location MON Date 2/23/2019

Save default

Pending

click on the \mathbf{T} Filters button to release the current filter to see entire list or start a new filter

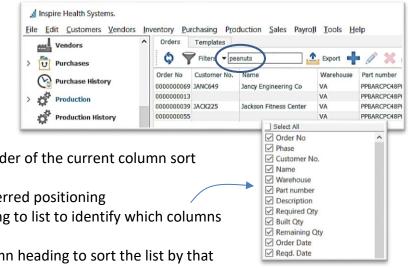
- Search type any character(s) into the field and the list will narrow to only records containing the character(s) typed, somewhere in the details
- open a Production Order to use the
 Navigate buttons K < >> > to
 page through Production Orders in

the list, filtered or not filtered, in order of the current column sort

Column Customization

ф.

- 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



√Spire User Manual

version 3.5 - volume 2 of 2

chapter 17 production manager



 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

Inspire Health Systems Edit Customers Vendors Inventory Purchasing Production Sales Payroll Tools Help File Orders Templates ----Vendors Ó Y 💁 Export 🚽 🖋 😸 🖨 litere earch > U Purchases Order No. Warehouse Part number Customer No. Name Purchase History 1: ekson Eitn PPBARCSC48PK 0000 VA > production 00000 029 JACK225 son Fitness Center VA RESCAB30 Ja RESCAB40 00000 030 JACK225 son Fitness Center VA Production History 031 JACK225 00000 son Fitness Center RESCAB50 VA 032 JACK225 RESCAB60 00000 son Fitness Center VA Point of Sale RESCARTO 0000000033 JACK225 kson Fitness Center VA 0000000 34 JACK225 ckson Fitness Center VA RESCARSO Sales History > VA 000000035 1ACK225 ss Center RESCARGO User Cindi Wa

C Refresh

Filters

Export New

Edit
 Delete
 Print

Build
 Requisition
 Copy
 Pull From Template

Next Status

Next Phase

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

▲ Exporting	×
Open File	Close

	Vendors	^	Orders	Templates	arch	Export	┣ ∥ >	ے ا
C	Purchase Histo	ory	Order No 000000007	Customer No.	Name		Warehouse VA	Part n PPBAR
2	Save Export File							×
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	Network	v	<					>
	File name:	production	_orders_pen	ding				~
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Spire User Manual

version 3.5 - volume 2 of 2

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chapter 17 production manager

+ Add New Production Order in one of 3 ways:

1. Add New Production Order Manually:

from the Production Order List > Orders tab click + New

Build Requisition	ext Phase Add To Calendar	KK	> >								
Communications Phase	User Defined										
der Information									Oper		
		1							Pend	ding roaress	
ld No 000000012							Status	Pending	In Pr	rogress	_
es Order	Q	Order Date	09/16/15			Q	Reference No	6			
se	Q	Required Date	11/20/15			Q	Priority	Normal	High	hest	
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entory VA /PPBARCCC48PKA	Description PP Bar Chewy Chocolate Chip	50g (48	Quantity 1.00000	Built Qty 0	temaining Qty I 1.00000	Extended Qty 1.00000	Unit Cost E 491.29125	xtended Cost UOM 491.29125 PK	Conv. Factor	Inv. Usage	_
VA /PPBARCCC48PKA	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating	50g (48	Quantity 1.00000 200.00	Built Qty 0.000000 0.000000	temaining Qty 1 1.00000 200.00000	Extended Qty 1.00000 200.00000	Unit Cost E 491.29125 0.48720	xtended Cost UOM 491.29125 PK 97.44000 GM	Conv. Factor	Inv. Usage 200.00	_
VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract	50g (48	Quantity 1.00000 200.00 50.00000	Built Qty 3 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000	Extended Qty 1.00000 200.00000 50.00000	Unit Cost E 491.29125 0.48720 1.00000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM	Conv. Factor 1 GM per 1 GM per	Inv. Usage 200.00 50.00	_
VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /ACAI VA /BRNSUG	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar	50g (48	Quantity 1.00000 200.00	Built Qty 3 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000	Unit Cost E 491.29125 0.48720 1.00000 0.06000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00	_
VA /PPBARCCC48PKA VA /PPBARCCC48PKA VA /YOGURICOATING VA /ACAI VA /BRNSUG VA /NONFATMILK	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract	50g (48	Quantity 1.00000 200.00 50.00000	Built Qty 3 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000	Extended Qty 1.00000 200.00000 50.00000	Unit Cost E 491.29125 0.48720 1.00000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM	Conv. Factor 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00	_
entory VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /ACAI VA /BRNSUG	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar	50g (48	Quantity 1.00000 200.00 50.00000 100.00	Built Qty 3 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000	Unit Cost E 491.29125 0.48720 1.00000 0.06000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	-
VA /PPBARCCC48PKA VA /PPBARCCC48PKA VA /YOGURICOATING VA /ACAI VA /BRNSUG VA /NONFATMILK	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 0 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	-
entory VA /PPBARCCC48PKA VA /VOGURTCOATING VA /ACAI VA /BRNSUG VA /NONFATMILK VA /ALMONDS	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 0 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	Les
VA /PPBARCCC48PKA VA /POBURTCOATING VA /ACAI VA /BRNSUG VA /NONFATMILK VA /ALMONDS	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 0 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	Le
VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /BRNSUG VA /NONFATMILK VA /ALMONDS	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 0 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	Le
VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /BRNSUG VA /NONFATMILK VA /ALMONDS	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 0 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	Le
VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /BRNSUG VA /NONFATMILK VA /ALMONDS	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 0 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	Les
vantary VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /BRNSUG VA /NONFATMILK	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk	50g (48	Quantity 1.00000 200.00 50.00000 100.00 12.00000	Built Qty 4 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000	temaining Qty 1 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	Extended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost E 491.29125 0.48720 1.00000 0.88000 0.45000	xtended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00 12.00	Le

- Build No is displayed, the sequence for which is established in Company Settings > Sequence Numbers > Production Orders tab
- option to enter or Q 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		-		×			
S Trik	ters • Sear	Export	+ /	1			
Phase	Description	Туре		Next Phase	Report	^	Ŀ
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0000000002		the set of		represent to the structure of the beaution of the		VA VA	
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000000062	1					VA	
						VA	
	Phase Phase BUILD PACKAGING PICKING C Order No 000000000 000000000 0000000	Prise Sear Phase Description BUILD Build PACKAGING Packaging PICKING Picking Pickog Filters Order No Phase 0000000000 PACKAGING 000000000 PACKAGING 0000000001 PACKAGING 0000000002 PACKAGING 0000000002 PACKAGING 000000002 PACKAGING 000000002 PACKAGING 000000002 PACKAGING	Filters Search Prase Description Type BUILD Build Production C Production C Production C Production C Production C Production Production Production C C C C PACKAGING Prase Customer No. 000000000 PACKAGING ARD488 000000000 PACKAGING PACKAGING 000000002 PACKAGING 0000000002 PACKAGING 000000002 PACKAGING 000000000 PACKAGING 0000000000 PACKAGING 000000000 PACKAGING 0000000000 PACKAGING 0000000000 PACKAGING 0000000000 PACKAGING 0000000000 PACKAGING 0000000000 PACKAGING 0000000000 000000000 000000	Filters Search Phase Description Type BUILD Build Production Order PICKING Packaging Production Order PICKING Picking Production Order C Picking Production Order PACKAGING Packaging Auphase Asymptotic PACKAGING Auphase Auphas	Image: Search Image: Search Image: Search Image: Search Phase Description Type Next Phase BUILD Build Production Order PlcKING PACKAGING Packaging Production Order PACKAGING PICKING Picking Production Order PACKAGING Order No Phase Oustomer No. Name 000000000 PACKAGING AAD488 Aardemy Rubbr Sta Outson Fitness Cen 0000000001 PACKAGING Jackson Fitness Cen Image: Search Image: Search 0000000000 PACKAGING Jackson Fitness Cen Image: Search Image: Search Image: Search 0000000000 PACKAGING Jackson Fitness Cen Image: Search Image: Search Image: Search 000000000000000 PACKAGING Jackson Fitness Cen Image: Search Image: Search Image: Search Image: Search 000000000000000000000000000000000000	Pitters Search Export Image: Pitters Phase Description Type Next Phase Report BUILD Build Production Order PICKING PACKAGING Packaging Production Order PICKING PICKING Picking Production Order PACKAGING Picking Production Order PACKAGING Export Image: Picking Order No Phase Ustomer No. Name Name 0000000001 PACKAGING AR895 A Bryant Webb Pc Academy Rubry Stamp Co Inc 0000000002 PACKAGING Jackson Fitness Center Jackson Fitness Center 0000000002 PACKAGING Jackson Fitness Center Jackson Fitness Center	Image: Search Lexport Image: Search Lexport Image: Search Phase Description Type Next Phase Report Build Production Order PICKING Packaging Production Order PICKING Picking Production Order PICKING Image: Search Image: Search

▲Spire User Manual

version 3.5 - volume 2 of 2

CHAPTER 17 PRODUCTION MANAGER

- 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)

Refresh Phases- bring in any new data that may have been entered by

the Phase determined here

another user since you have had this module open or since the last time data has been refreshed

🕁 🍸 Filters 🔻 Search 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.

+ New Phase

• enter **Phase Code**

o enter **Description**

Title

accept Production Order Phase Type

options to select a **Report Template** to be printed

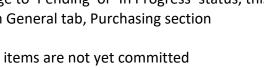
when this Phase is assigned (ie: production order)

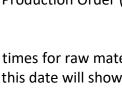
Φ

- 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

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- 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





Highest

High



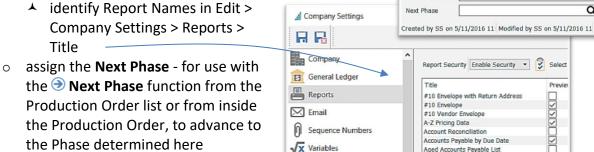
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\$	Refresh
Ŷ	Filters
1	Export
+	New
ſ	Edit
×	Delete

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Multi-Currency

Phase - Packaging

к<>>

Phase Type Description

Report Template

PACKAGING Production Order

Packaging

Aged Accounts Receivable List