# 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**
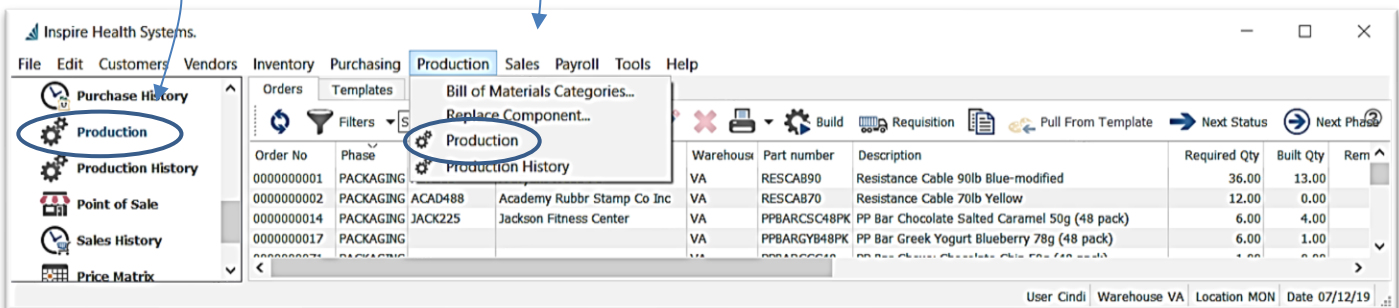
- 🔄 **Refresh** - load any new Production Orders that may have been created by another user since the last time data has been refreshed and that may not be displayed
- **Production Order List Customization**
    - ◆ ▼ **Filters** - create a filter for this list
        - ✛ click ▼ **Filters**
        - ✛ 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)
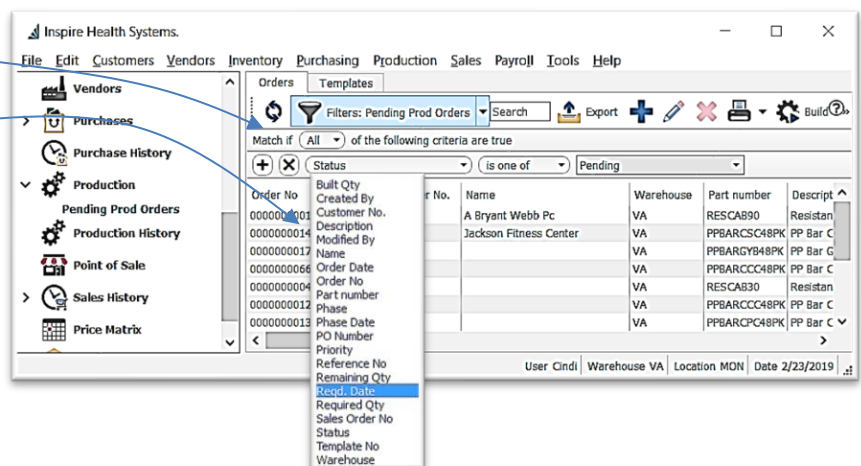
- select ▽ **Filters** ▼ for save options
  - ○ **Save default** - this filter will be active whenever viewing Production Orders
  - ○ **Save preset** - will load this Filter when the Filter button is on
  - ○ **Save preset as…** will allow you to name the Filter with the following settings:
    - ⌃ 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 ⏮ ◀ ▶ ⏭ to page through Production Orders in the list, filtered or not filtered, in order of the current column sort
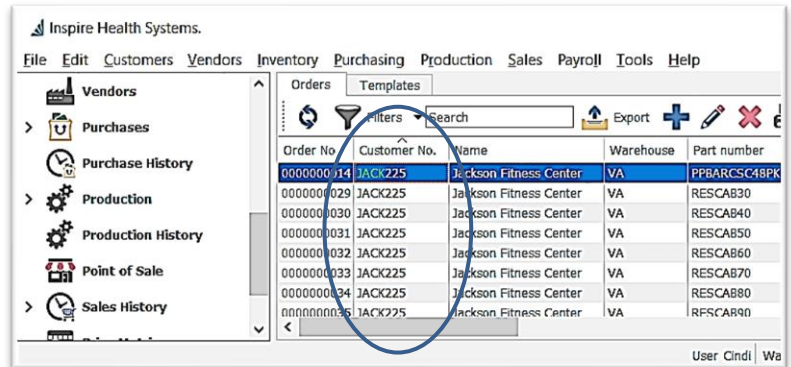- **Column Customization**
  - drag and drop columns for preferred positioning
  - right-click on any column heading to list to identify which columns you wish to see in the grid
- ⌃ **Column Sort** - click on any column heading to sort the list by that column

- ✦ 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
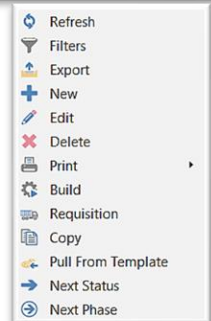
■ Production Order List **Context Menu** - right-click any line to display

■ 📤 **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
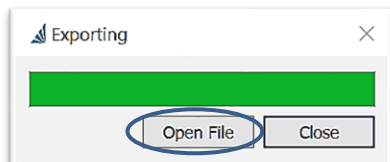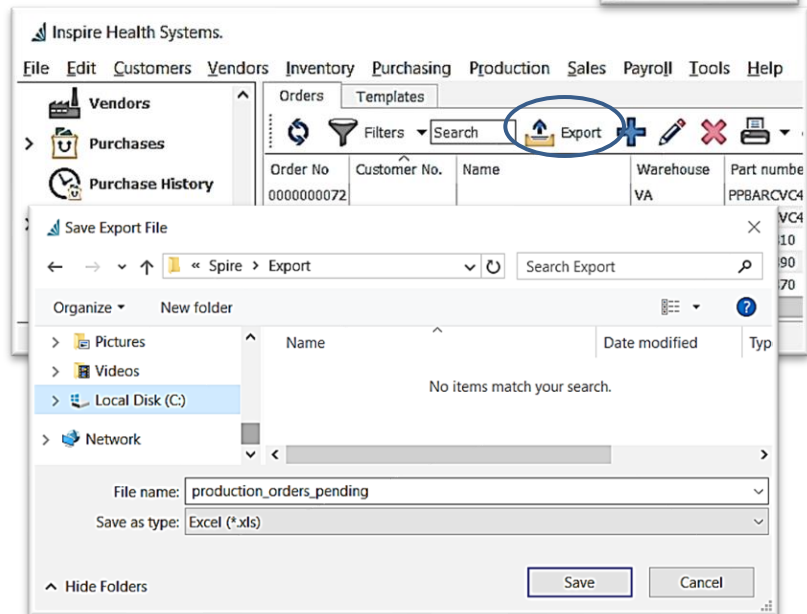
✚ **Add New Production Order** in one of 3 ways:

1. **Add New Production Order Manually**:
   - ◆ from the Production Order List > **Orders** tab click ✚ **New**

- ◆ **Build 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

CHAPTER 17 PRODUCTION MANAGER
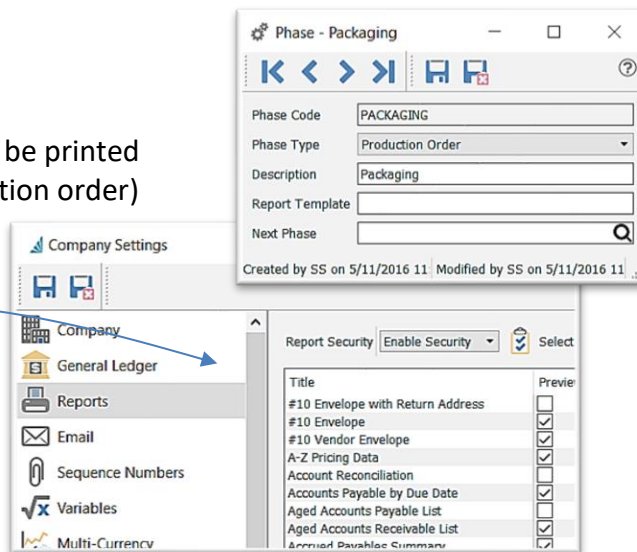
- ✚ **New Phase**
  - o enter **Phase Code**
  - o accept Production Order **Phase Type**
  - o enter **Description**
  - o options to select a **Report Template** to be printed when this Phase is assigned (ie: production order)
    - ⌃ identify Report Names in Edit > Company Settings > Reports > Title
  - o 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
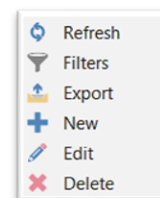- 🔽 Filters ▾ | Search | **Filter / Search / Customize Phases List** - see **Production Order List Customization**, page 1
- Phases **Context Menu** - right-click on selected line(s) in the list to display
- ⬆ **Export** Phases list in Excel or CSV format - see **Export**, page 3
- ✏ **Edit** Phase selected.
- ✖ **Delete** Phase selected
- ◆ option to enter or 🔍 browse for a **Phase Date** for the Phase assignment
- ◆ option to enter or 🔍 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 🔍 browsing
- ◆ enter or 🔍 browse for the **Required Date**, which is used to determine order times for raw materials
  - ✚ once the Production Order is changed 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)