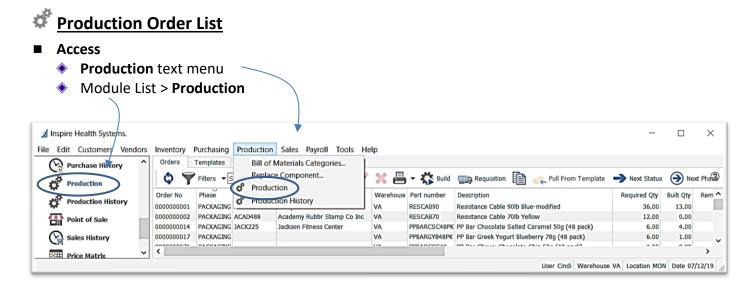
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# CHAPTER 17 PRODUCTION MANAGER



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

#### **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')
- Inspire Health Systems Edit Customers Vendors Inventory Purchasing Production Sales Payroll Tools Help Orders Templates -🚯 🍸 Filters: Pending Prod Orders 🔻 Search 🔮 Export 🕂 🥢 💥 📇 🗸 🖏 Build®, Ū Match if (All •) of the following criteria are true  $\bigcirc$ Purchase Histor + X Status (is one of Pending Production Name Part number Descript \* No. Warehouse Pending Prod Orders A Bryant Webb Pc RESCAB90 Resistan VA PPBARCSC48PK PP Bar C Production History Jackson Fitness Center VA PPBARGYB48PK PP Bar G 0000000017 N VA 0000000066 Order Date 0000000004 Order No 0000000012 Phase Point of Sale PPBARCCC48PK PP Bar C VA Resistan VA RESCAB30 Sales History VA PPBARCCC48PK PP Bar C COUCOUDD12 Phase COUCOUDD13 Phase Date COUCOUDD13 Phase Date VA PPBARCPC48PK PP Bar C V Price Matrix Priority Reference No 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 본 Φ
- make any column adjustments (see Column Customization page 2)

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## CHAPTER 17 PRODUCTION MANAGER

- select **Filters** for save options
  - Save default this filter will be active whenever viewing Production Orders 0
  - Save preset will load this Filter when the Filter button is on 0
  - Save preset as... will allow you to name the Filter with the following settings:
    - ▲ give this filter a name
    - select User if this filt be used just for this Us
    - select Company if it accessed by all users a this Company data
    - Show in module list display beneath 3 the module File
    - Save column state if you have removed or added columns. or have sorted the list by one of the columns

lter it will ser t is to be accessing	inter filter ding Prod O Jser Show in mo Save column	dule list	Rer Sav Sav Del	Save default Remove default Save preset Save preset as Delete "Pending Prod Orders" Pending Prod Orders				
<b>t</b> to			Ж	Cancel			_	
Inspire Health Systems. Ie <u>E</u> dit <u>C</u> ustomers <u>V</u> ende	ors <u>I</u> nv	rentory <u>P</u> ur	rchasing	Production S	ales Payro <u>l</u> l <u>T</u> ools <u>I</u>	<u>H</u> elp	- 0	×
Vendors	^	Orders		ending Prod Orde		port 📲 🦉	×≞-⊀	Build 🔊
Purchase History		000	Status	he following criter		ding	•	
Production Pending Prod Orders		Order No 0000000001 0000000014	Pending	Customer No. ABR885 JACK225	Name A Bryant Webb Pc Jackson Fitness Center	Warehouse VA VA	Part number RESCAB90 PPBARCSC48PK	
Point of Sale		0000000017 0000000066 000000004	Pending Pending			VA VA VA	PPBARGYB48PK PPBARCCC48PK RESCAB30	PP Bar C Resistan
Price Matrix		0000000012				VA VA	PPBARCCC48PK PPBARCPC48PK	

Filters: Pending Prod Orders V Sear

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

- click OK
- click on the T Filters ф

button to release the current filter to see entire list or start a new filter

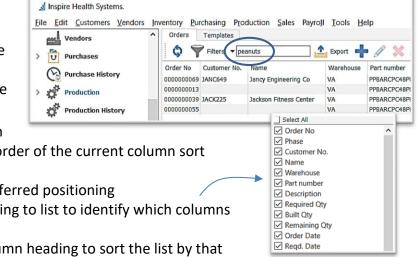
<

- 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**

- 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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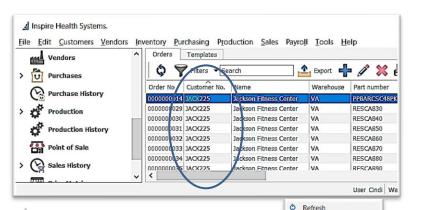
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## chapter 17 production manager



 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

 \* note \* this also searches Components



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

A Exporting	×
Open File	Close

Vendors	^	Orders	Templates	arch	Export	+ / >	\$ <b>8</b>
Purchase Histo	ory	Order No 0000000072	Customer No.	Name		Warehouse VA	Part nu PPBARC
🔬 Save Export File							$\times$
← → • ↑ 📜	« Spire >	Export		~ Ŭ	Search Expo	rt	م
Organize • New	folder						?
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> 🗳 Network	~	<					>
File name:	production	_orders_pend	ding				~
Save as type:	Excel (*.xls)						~
∧ Hide Folders					Save	Cance	:

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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 🔿 Ne	ext Phase Add To Calendar	K K	> >								
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ler Information									Pend		
ld No 000000012		]					Status	Pending	In Pr	ogress	_
es Order	Q	Order Date	09/16/15			Q	Reference No	0			
se	0	Required Date	11/20/15			0	Priority	Normal	High	nest	
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rentory	Description	50g (48	Quantity	Built Qty	emaining Qty E	xtended Qty	Unit Cost E	extended Cost UOM			
va /PPBARCCC48PKA	Description PP Bar Chewy Chocolate Chip	50g (48	Quantity 1.00000	Built Qty 0.00000	emaining Qty E 1.00000	xtended Qty 1.00000	Unit Cost E 491.29125	Extended 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 & 0.00000 0.00000	emaining Qty E 1.00000 200.00000	xtended Qty 1.00000 200.00000	Unit Cost E 491.29125 0.48720	Extended Cost UOM 491.29125 PK 97.44000 GM	Conv. Factor 1 GM per	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 & 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000	xtended Qty 1.00000 200.00000 50.00000	Unit Cost E 491.29125 0.48720 1.00000	Extended 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	
ventory 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 & 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM	Conv. Factor 1 GM per 1 GM per 1 GM per	Inv. Usage 200.00 50.00 100.00	_
ventory 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 & 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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	_
VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /BNSUG 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 8 0.00000 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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 /BNSUG 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 8 0.00000 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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
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 8 0.00000 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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 /BNSUG 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 8 0.00000 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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 /BNSUG 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 8 0.00000 0.00000 0.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost 8 491.29125 0.48720 1.00000 0.06000 0.88000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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
ventory 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 & 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000 1.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000	Unit Cost E 491.29125 0.48720 1.00000 0.06600 0.48000 0.45000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 6.00000 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
ventory VA /PPBARCCC48PKA VA /YOGURTCOATING VA /ACAI VA /BRNSUG VA /RNSUG VA /NONFATMILK VA /ALMONDS duction Order Notes	Description PP Bar Chewy Chocolate Chip High Protein Yogurt Coating Acai Fruit Extract Brown Sugar Nonfat Milk Almonds	50g (48	Quantity 1.00000 200.00 100.00 100.00 12.00000 150.00 Committee	Built Qty & 0.00000 0.00000 0.00000 0.00000 0.00000 0.00000 1.00000 0.00000 0.00000	emaining Qty E 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	xtended Qty 1.00000 200.00000 50.00000 100.00000 12.00000 150.00000	Unit Cost E 491.29125 0.48720 1.00000 0.06600 0.48000 0.45000	Extended Cost UOM 491.29125 PK 97.44000 GM 50.00000 GM 10.56000 GM 67.50000 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 12.00 150.00	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

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	Phase	Description	Туре		Next Phase	Report	^	
Inspire Health Systems.	BUILD	Build	Production (		PICKING		- 11	
File Edit Customers Vendo	PACKAGING	Packaging	Production (					
E4.	PICKING	Picking	Production (	Order	PACKAGING			
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Purchase History	\$ <b>7</b>	Filters - Se	earch	Exp	ort 🕂 🧳	X 6	•	4
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	000000071	PACKAGING					VA	
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> 🚱 Sales History	000000062	1						
> 🚱 Sales History	000000062						VA	_

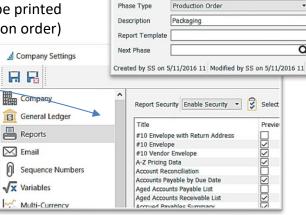
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## CHAPTER 17 PRODUCTION MANAGER

#### + New Phase Φ

- enter Phase Code
- accept Production Order Phase Type 0
- o 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
- o assign the Next Phase for use with the <a>> Next Phase function from the</a> Production Order list or from inside the Production Order, to advance to the Phase determined here



Phase - Packaging

K < > >

PACKAGIN

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 **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 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)

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Q