



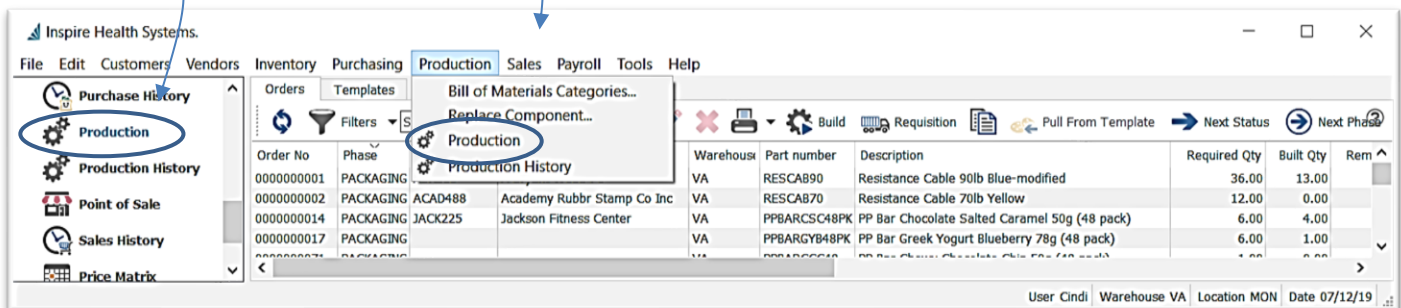
CHAPTER 17 PRODUCTION MANAGER


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

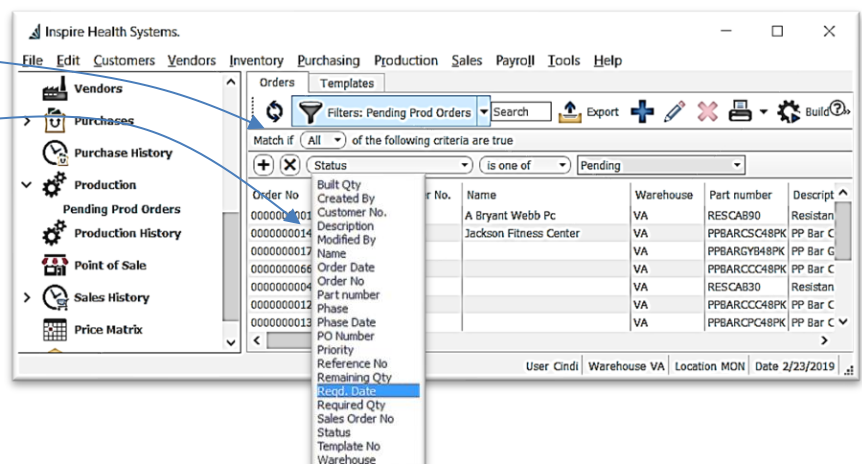


-  **Refresh** - load any new Production Orders that may have been created by another user since the last time data has been refreshed and that may not be displayed

■ 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 **◀ ▶** to page through Production Orders in the list, filtered or not filtered, in order of the current column sort

Column Customization

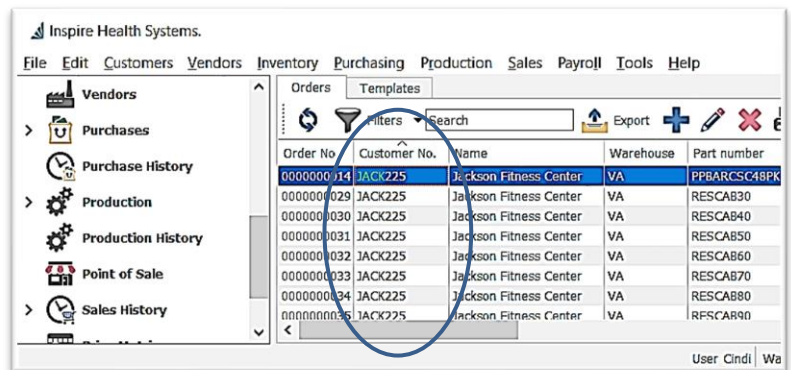
- drag and drop columns for preferred positioning
- right-click on any column heading to list to identify which columns you wish to see in the grid

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



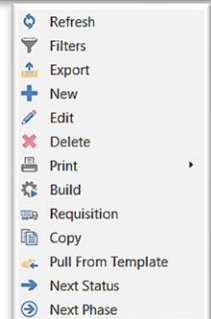
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- ✦ further narrow your search by just typing (you will see the typed letters turn green) and the list will highlight the closest match, in currently sorted column
 - * note * this also searches Components



Icon Menu Customization

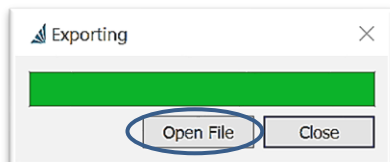
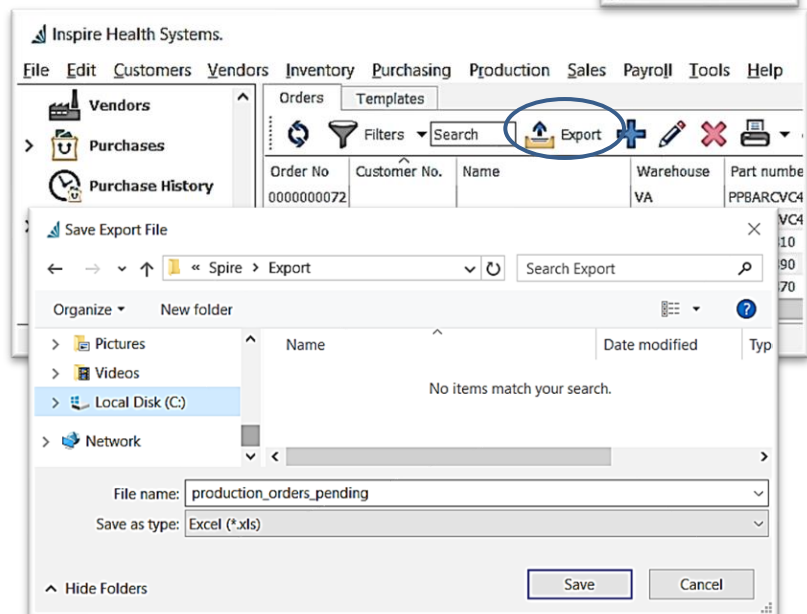
- ✦ hover over the Icon Group handle until you see
- ✦ drag the Icon Group to where you want it



- 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**

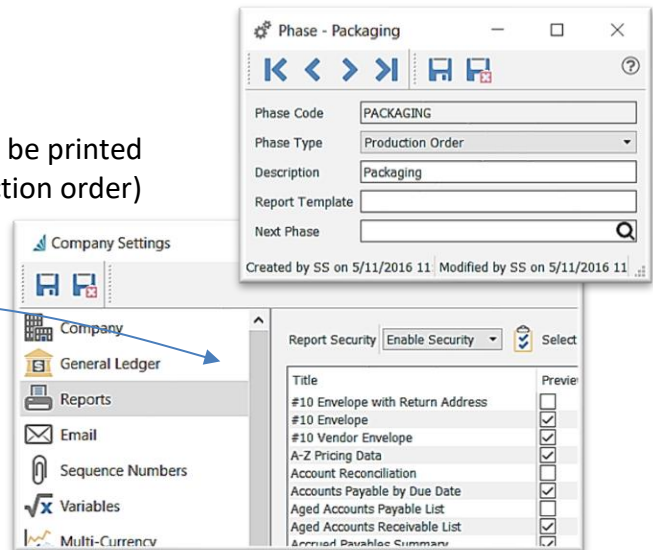
- ◆ **Build No** is displayed, the sequence for which is established in Company Settings > Sequence Numbers > Production Orders tab
- ◆ option to enter or browse for a related **Sales Order** if this is a Sales Order-specific Production Order (see also Add New Production Order from a Requisition from 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



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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

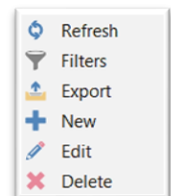
+ Filter / Search / Customize Phases List - see **Production Order List Customization**, page 1

+ 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 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)

