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.
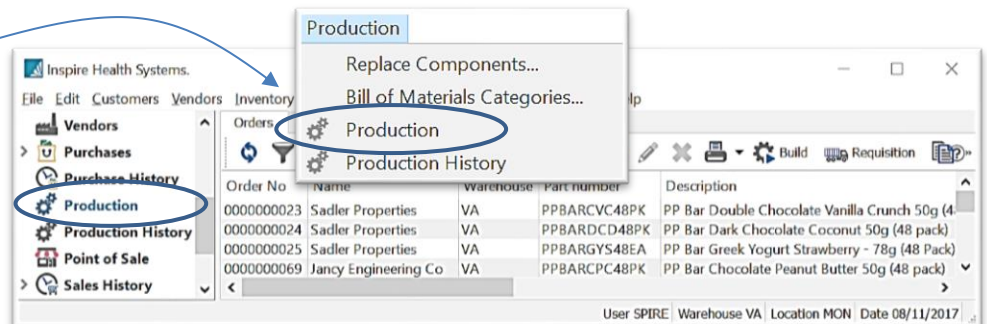
Production Order List

- **Access**
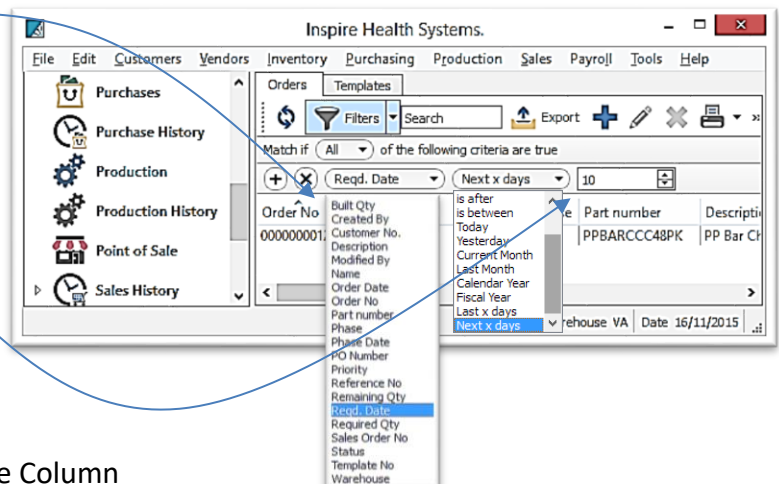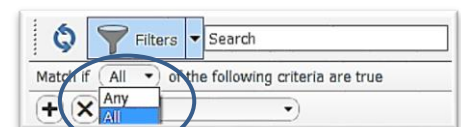 - ◆ **Production** text menu
  - ◆ Module List > **Production**
- 🔄 **Refresh** - load any new Production Orders that may have been created by another user since the last time data has been refreshed and that may not be displayed

- **Production Order List Customization**
  - ◆ 🔽 **Filters** - create a filter for this list
    - ⊕ click 🔽 **Filters** icon
    - ⊕ select from the **Any** or **All** operators
    - ⊕ select from the list of fields to set the criteria
    - ⊕ select from the functions ie: 'is one of', 'is not', 'Next x days', etc - this function list changes based on the field selected in the previous step
    - ⊕ enter the criteria information
    - ⊕ if desired click ➕ to add a line of criteria
    - ⊕ to remove the criteria line click ✖
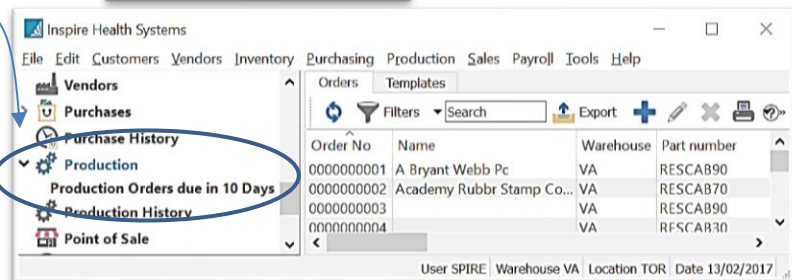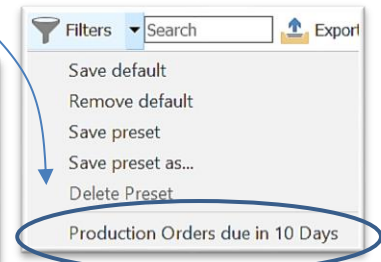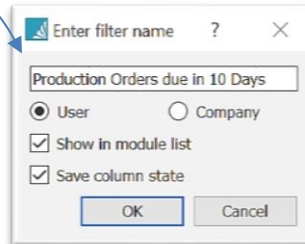   - ⊕ make any column adjustments (see Column Customization page 2)

- select ▼ **Filters** ▾ for save options
  - o **Save default** - this filter will load when you click the ▼ **Filters** button
  - o **Save preset** - will add the current filter to the Filters menu
    - ⌃ 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 name in the module list
    - ⌃ ☑ **Save column state** if you have removed or added columns, or have sorted the list by one of the columns
    - ⌃ click OK…this new filter will display in the Filters menu
  - o **Save preset as…** - if you have loaded an existing Filter, changed the criteria set, and want to save this Filter under a different name
- 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
- ◆ **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
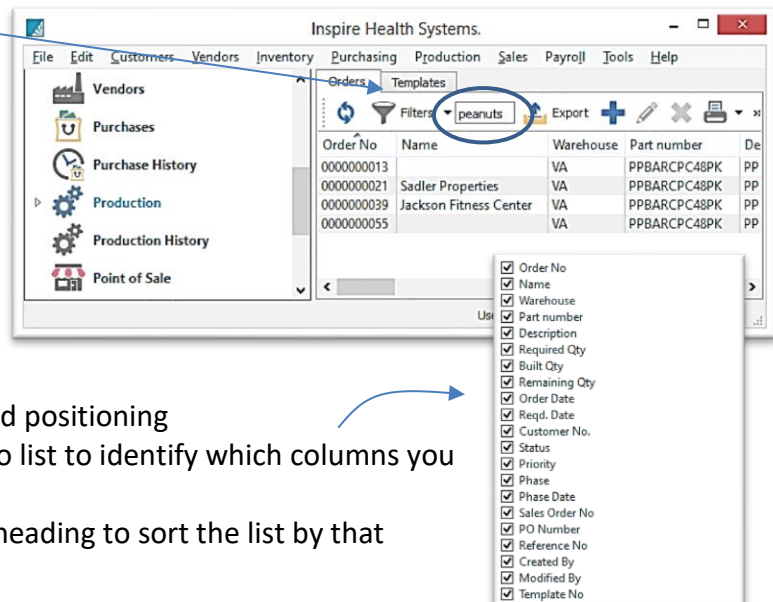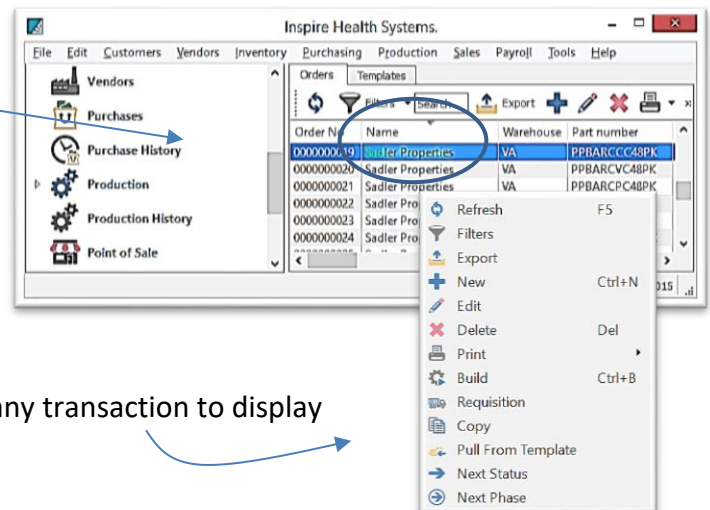
- + further narrow your search by just typing and the list will highlight the closest match, in currently sorted column
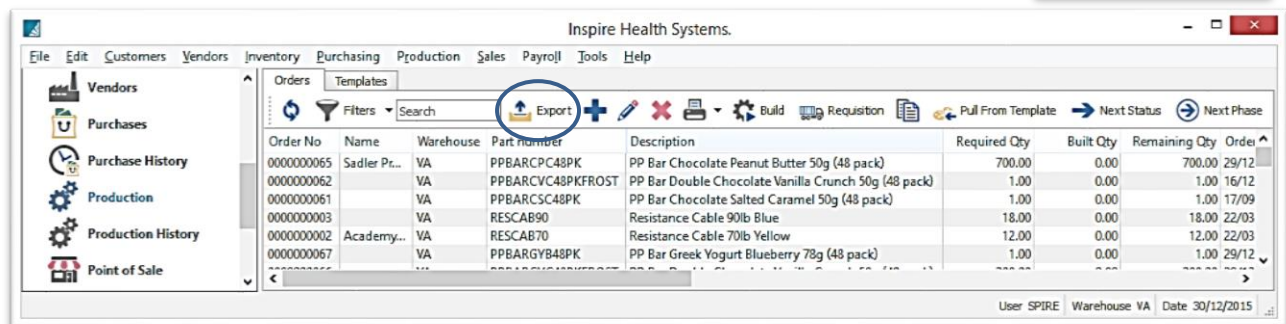- ◆ **Icon Menu Customization**
  - + hover over the Icon Group handle until you see
 - + drag the Icon Group to where you want it

■ Production Order List **Quick Menu** - right-click any transaction to display

■ ⬆ **Export Production Order List**

- ◆ **Access** - Production Order List task bar
- ◆ select Production Order(s) from a filtered list (will export exact column layout) or unfiltered list (see Filters Page 1)
- ◆ 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
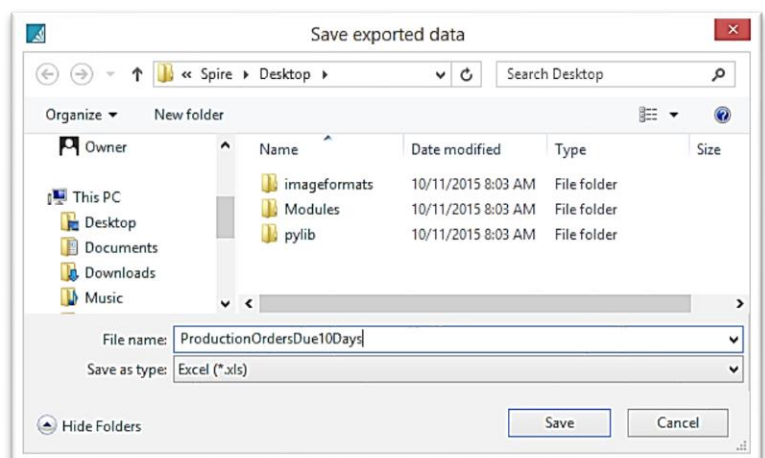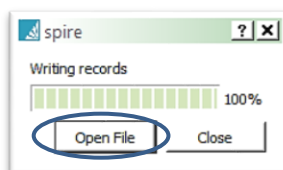
➕ Add New Production Order in one of 3 ways:

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 Sales Order page 13)

   ◆ **Phases** 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 Production Order list, for use in filters, searches and reports

- ✚ **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 Templates in Edit > Company Settings > Reports > Template
  - 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
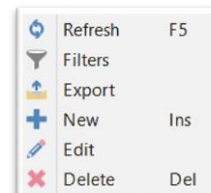- ▼ Filters | Search | **Filter / Search / Customize Phases List** - see **Production Order List Customization**, page 1
- **Phases Quick Menu** - right-click on selected line(s) in the list to display
- 📤 **Export** Phases list in Excel or CSV format - see **Export**, page 3
- ✎ **Edit** Phase selected.
- ✖ **Delete** Phase selected
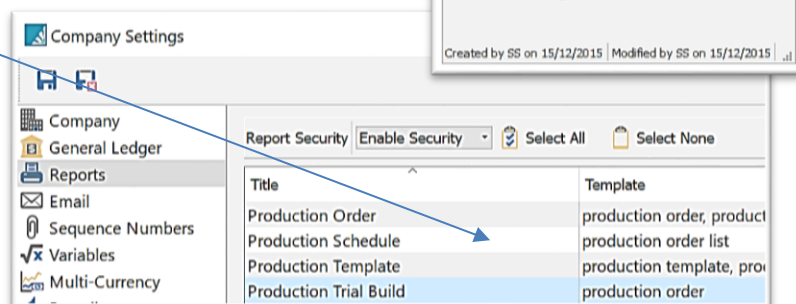
- ◆ option to enter or 🔍 browse for a **Phase Date** for the Phase assignment
- ◆ option to enter or 🔍 browse for a related **Customer** for a Customer-specific Production Order (see also Add New Production Order from a Sales Order page 13)
- ◆ accept the **Order Date** or change by entering or 🔍 browsing
- ◆ enter or 🔍 browse for the **Required Date**, which is used to determine order times for raw materials
  - ✚ once the Production Order is 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)