Production Order Process – Integrated Calculator

Required:

BOM's: Active (BOMS Workflow) – Driven by Integrated Calculator

Inventory: Final Goods, Raw Materials, Costs

Labour: Configuration | Labour Rates – Matrix of rates

Overheads: Overhead Discussion

Machines: Machine listing and Cost and Scheduling?

Sales Process

We will cover this quickly from a perspective of what information is available and how it gets to the Production Order.

From the CRM system / Opportunities, Create Quote.

Select the Template for the Customer in ADV– based on the standard order that they require.

This will populate the Attributes of this required job in ADV.

Open the Integrated Calculator – Refresh All from the Velixo tab in Excel.

The details of the job will populate in the calculator along with earlier jobs – select the current job in cell G51 by drop down box.

Complete Quote in Integrated Calculator

Write-Back From "Calc Form" to produce:

The Production Order - called WO<QuoteNo.>

Production Header (Production Order Maintenance)

Production Order Detail

Other associated reports such as Production ticket with Attributes

Commence Production Order from Production Order

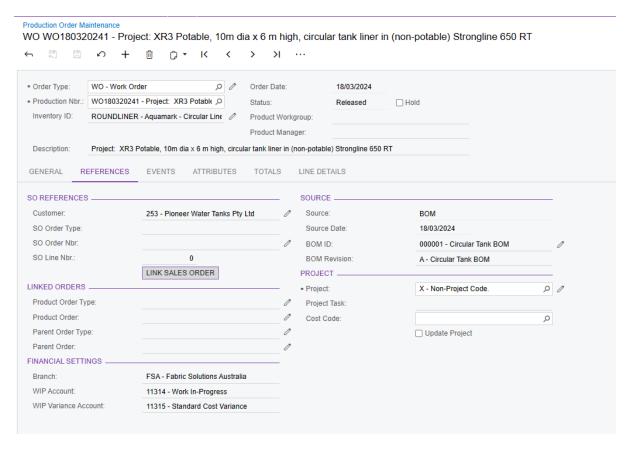
View the header for the Work Order.

Production Order Workspace | New Production Order Maintenance

Select the WO required.

(for New would follow this process – Production Order Maintenance button or

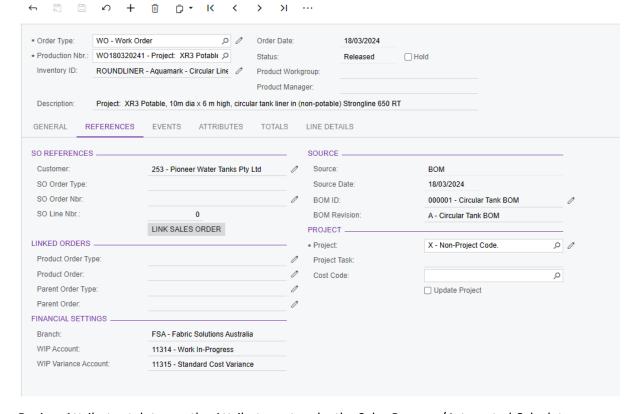
Production Order Maintenance (New +) – This is how you recall Prod Orders too.)



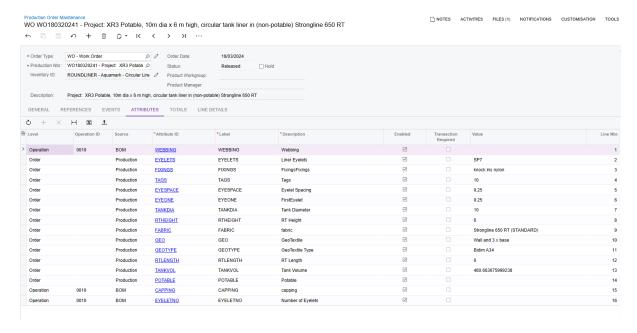
Review Reference tab

Production Order Maintenance

WO WO180320241 - Project: XR3 Potable, 10m dia x 6 m high, circular tank liner in (non-potable) Strongline 650 RT

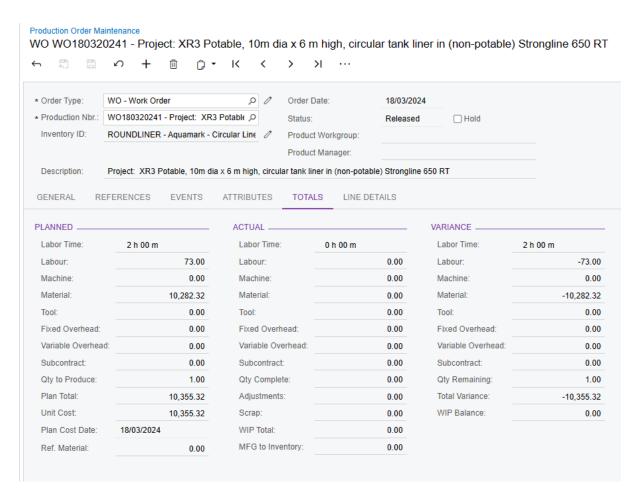


Review Attributes tab to see the Attributes set up by the Sales Process / Integrated Calculator.



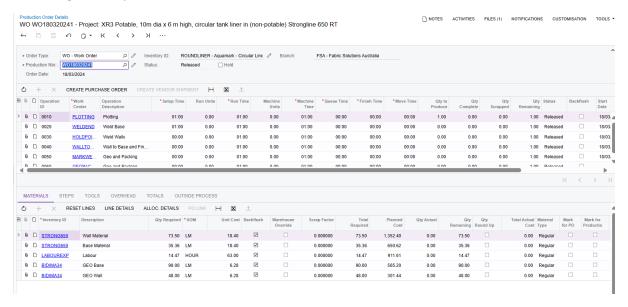
Review Totals tab and Line details to make sure this appears to be correct.

Save and click on ... button and Release Order (you can "Plan Order" later to make changes).

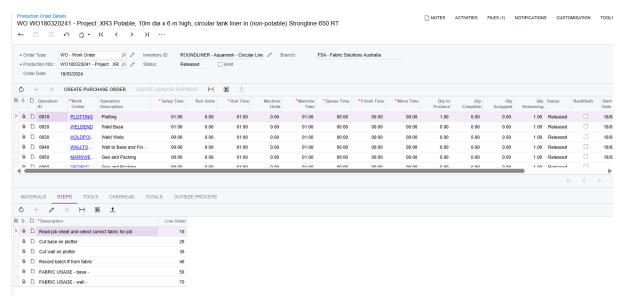


Can also print Production Ticket from this menu.

From the ... menu, select Other | Production Details to view the Production Details of this order. Can also go directly to Production Order Detail from the Production Order Workflow.



Select the relevant Work Centre to review each line to show its inclusions (from below (Materials / Steps / Tools / Overhead / Totals / Outside Processes). The WO calls from the BOM for the steps etc. These can be changed in the BOM.



Make sure the

Production Order is Released to be able to add Labour and Materials

Actual Transactions – can be added in several ways. Not least of which is the Mobile App for timesheet and allocation of materials to jobs.

Actual Labour to the Order

Labour can be added in line with the Work Centres included in the Prod Order (generated from the BOM or changed directly in the ProdOrder).

A few Methods:

- Labour Transaction Entry
- Clock Entry
- Mobile App
- Upload combination from BundyPlus

Labour Transaction Entry

Production Order Workflow | Labour (under Transactions)

Add a record (+)

Complete the header

Add new detail record(s)



Save and Release

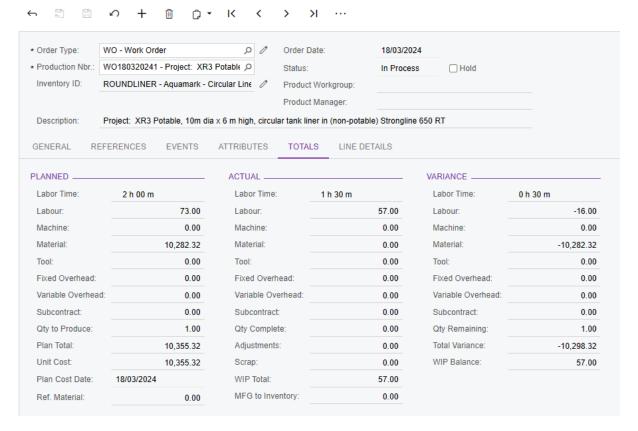
Create Labour Time Activities

Select the line entry and click PROCESS

You can review from Production Order Maintenance

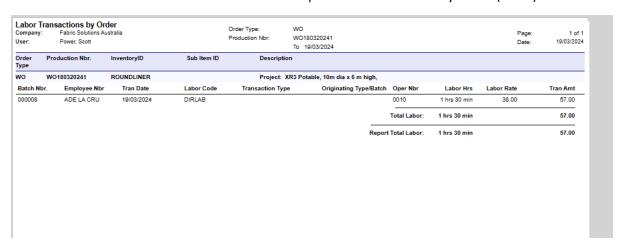
Production Order Maintenance

WO WO180320241 - Project: XR3 Potable, 10m dia x 6 m high, circular tank liner in (non-potable) Strongline 650 RT



Or Production Order Detail – on the line provided in the Timesheet (0010)

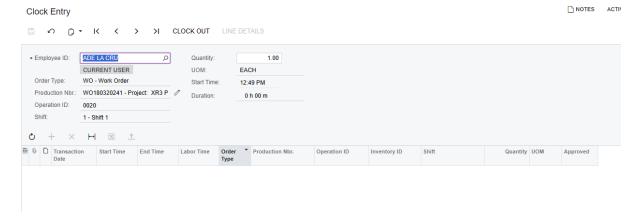
You can review from Production Order Workflow | Labour Transactions by Order (Audit)



Clock Entry

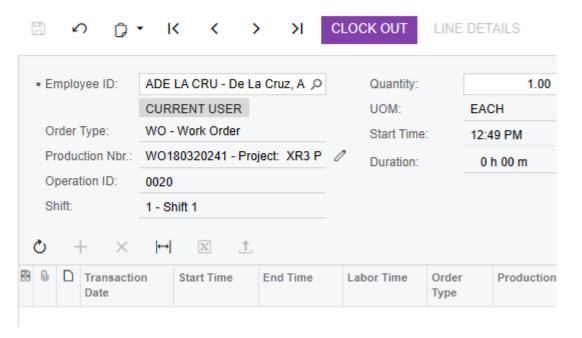
Production Orders Workflow | Clock Entry

Complete the header and click the "CLOCK IN" button

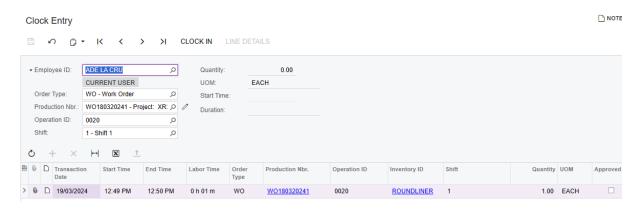


When done - click the CLOCK OUT button

Clock Entry



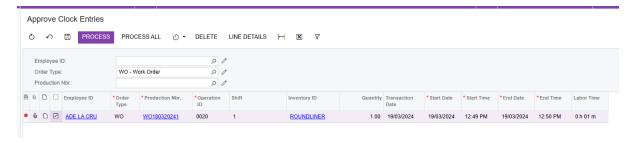
The record will write in details below



Approve Timeclock Entry

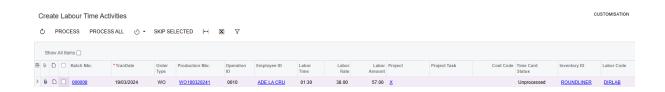
The approver will approve by Production Orders Workflow | Approve Clock Entries (Processes)

Select the line entry and click PROCESS



Create Labour Time Activities

Select the line entry and click PROCESS



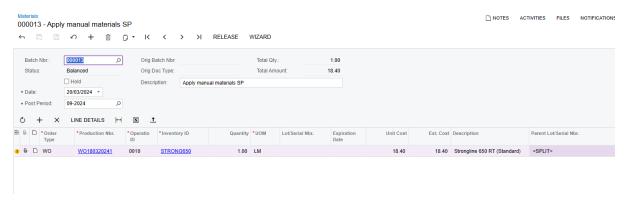
Materials

If the materials are on hand -

Production Orders Workflow | Materials

Add a New Record (+)

Complete the Details section by adding lines (+ bottom section).



RELEASE

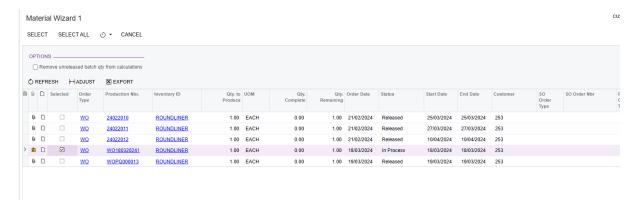
Critical Materials

or if applied in bulk as per the setup / budget plan.

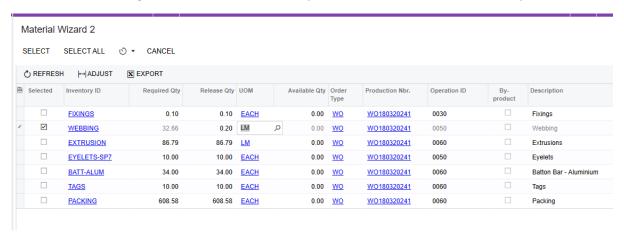
From Production Order Workflow | Materials

Click Wizard

Select the Production Order required and Click Select



Select the Items being added and the "Release Qty" or leave as ful default Release Qty.



SELECT

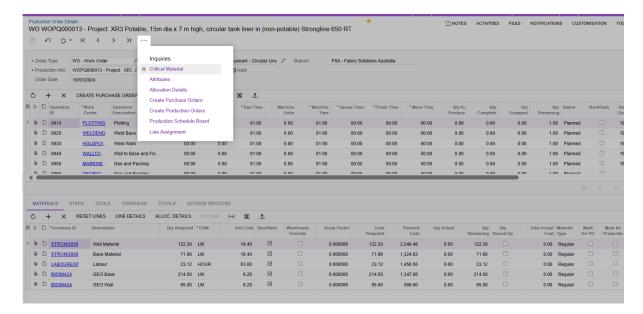
System will generate the Materials Entry.

Redo Process as required.

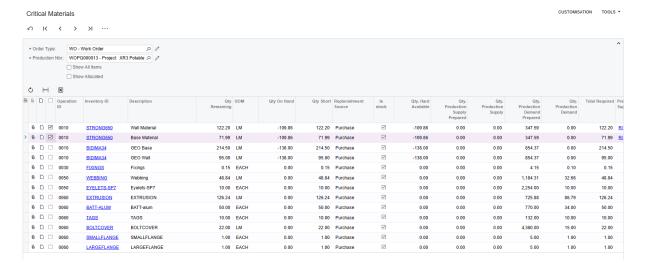
If Materials need to be purchased for this job

This is not setup as the stock is allowed to go into negative at the moment for testing purposes.

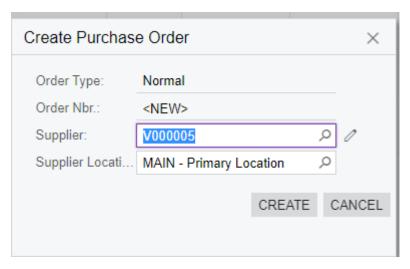
From Production Order Details – Critical Materials



Select lines that you want to Purchase / Manufacture

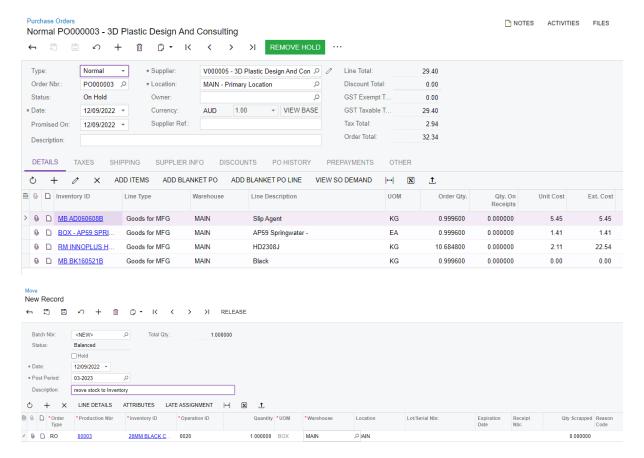


Click PURCHASE button



Select a Vendor and CREATE

Remove Hold and Process PO as usual to receive and cost materials

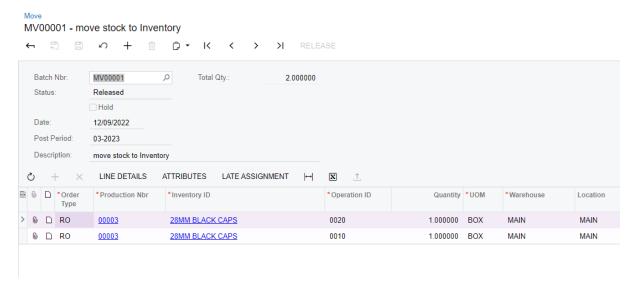


MOVF TO STOCK

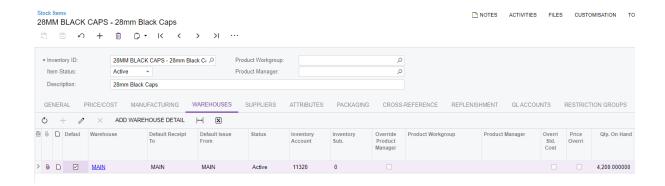
Use this process to move the completed stock to SOH to be able to ship / pick

Production Order Workflow | Move

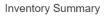
Add New Record (+)

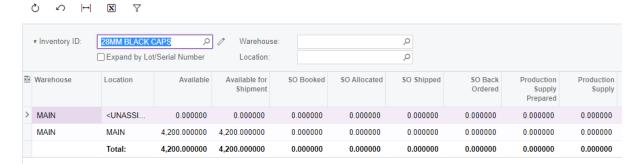


Review SOH in Inventory | Stock Items | Warehouse tab



Or Inventory | Inventory Summary (under Inquiries)





Allocating Stock to the Sales Order

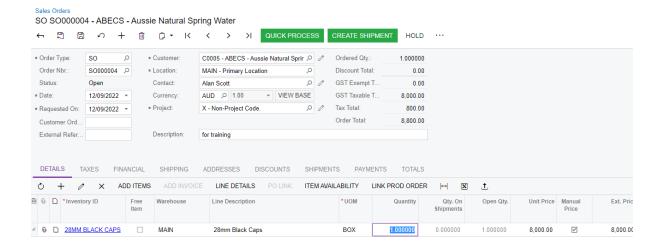
The SO has been added to the system from the Integrated Calculator

If a SO does not exist, add one and add the lines for this product that is now SOH.

To continue the SO that created the Production Order process, from the Sales Orders Workflow | Sales Orders and select the relevant SO.

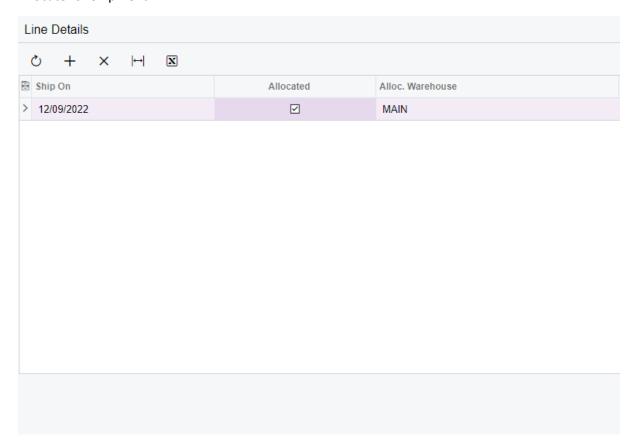


As Stock is now on hand, you can QUICK PROCESS or CREATE SHIPMENT

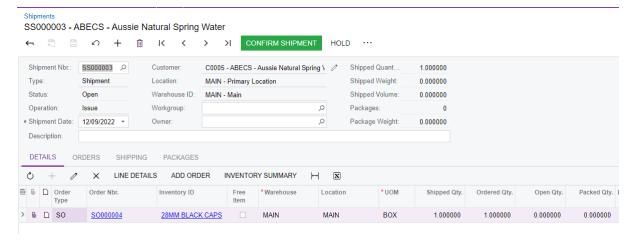


Click Line Details

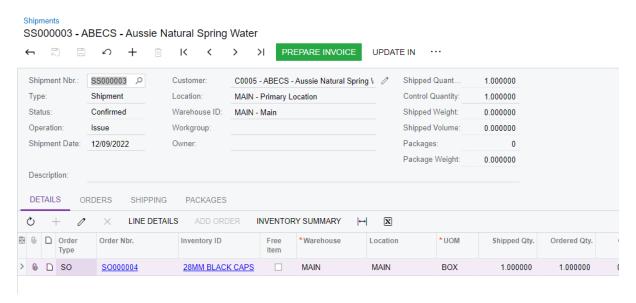
Allocate for Shipment



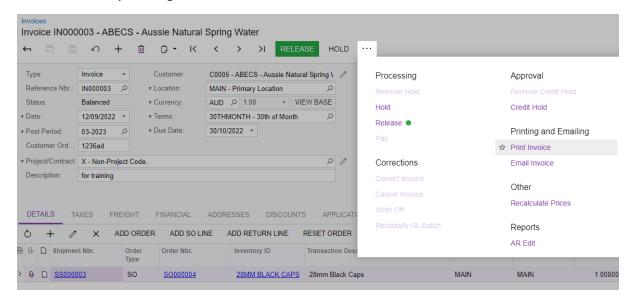
CONFIRM SHIPMENT



PREPARE INVOICE



Review Invoice by Printing Invoice or RELEASE



See Supplier Invoices in Payables Workflow | Bills and Adjustments

See remaining Production Orders in Production Order Maintenance – see tabs for various status of completion

See Profitability in various ways from the Sales Orders Workflow

Daily Sales Company/Bran		y (Detailed)		From D To Date		1/09/2022 12/09/2022					Page: Date: User: Relea	12/09/20	1 of 1 22 1:19 PM power, scott ns Only
Branch:	MAIN												
Customer:	C0005	Custom	er Name: Al	BECS - Aussie	Natural Sprin	g Water							
Fin. Period	Doc. Date	Doc. Type	Ref. Nbr.	Ship. Nbr.	Warehouse	Order Type	Order Nbr.	Order Date	Currency	Net Sales	Cost	Margin	Margin %
03-2023	12/09/2022	Invoice	IN000003	SS000003	MAIN	SO	SO000004	12/09/2022	AUD	8,000.00	102.94	7,897.06	98.71
								Customer Total:		8,000.00	102.94	7,897.06	98.71
								Branc	h Total:	8,000.00	102.94	7,897.06	98.71
								Total:		8,000.00	102.94	7,897.06	98.71