



Manufacturing Edition

Product Demonstration Script

January 2018

Acumatica Manufacturing Edition Core Modules

Bill Of Material

- Integrated BOM/Routing
- Multi level BOM/Routing
- Activity-Based Costing
- Fixed & Variable Overhead
- Effectivity / Expiration Dates
- Flexible Copy BOM
- Define Outside Processes
- Reference Designators
- Production Steps
- Multi-Site
- Phantoms

Material Requirements Planning

- Full Regeneration
- Master Production Schedule
- Purchase / Production
- Sales Forecasting
- MRP Buckets
- Transfer Recommendations
- Multi-Site Demand Planning

Production Management

- Labor Tracking
- Material Tracking
- Lot / Serial Tracking
- Scheduling
- Production Performance
- Production Changes
- Backflush Labor & Materials
- Auto-create Linked Orders
- Barcode Integration
- Event Audit Trail
- Multi-Site

Acumatica Manufacturing Edition: Optional Modules

Estimating

- Integrated with Opportunities
- Integrated with Sales Orders
- Simple or Complex Estimates
- Create from existing BOM
- Use Non-Inventory Items
- Auto-create Inventory Items
- Estimate Revision Control
- Fixed and Variable Overheads
- Flexible Copy Options

Product Configurator

- Integrated with Opportunities
- Integrated with Sales Order
- Rules Based
- Features and Options
- Price and Cost Rollup Options
- Supplemental Items
- Dimensional
- Configure from Customer Portal

Coming Soon

- Advanced Planning and Scheduling
- Project Manufacturing
- Engineering Change Control

Overview

- Demo Topics:
 - Configuration
 - MFG Dashboard
 - Stock Item Record
 - Bill of Materials
 - Production Examples
 - Make to Stock
 - Make to Order
 - Configure to Order
 - Engineer to Order
 - Material Requirements Planning (MRP)

Revision Two HQ ▾ Manufacturing Dashboard DESIGN TOOLS

PRODUCTION ORDERS TO INVOICE

Type	Reference Nbr.	Customer ID	Amount
Invoice	002138	ABCSTUDIOS	3,240.00
Invoice	002139	FDIAGRI	50.00
Invoice	002140	ABARTENDE	10,000.00
Invoice	002140	ABARTENDE	4,000.00
Invoice	002141	ABARTENDE	500.00
Invoice	002144	ABARTENDE	3,408.60
Invoice	002145	WATERPROC	2,400.00
Invoice	002146	FDIAGRI	1,732.50

PRODUCTION IN PROCESS

Order Type	Production Nbr	Inventory ID	Customer ID	SO Order Nbr	Status	Start Date	End Date	Qty to UOM Produce	Qty Complete	Qty Customer Scrapped Name
PM	0000009	AAMACHINE1			Planned	4/7/2017	4/7/2017	1.000000 EA	0.000000	0.000000
RO	0000001	AACOMPU...			Planned	12/21/2016	12/21/2016	1.000000 EA	0.000000	0.000000
RO	0000003	AMPCEB			Planned	1/10/2017	1/10/2017	1.000000 EA	0.000000	0.000000
RO	0000004	AAMACHINE1			Planned	4/7/2017	4/7/2017	1.000000 EA	0.000000	0.000000
RO	0000010	AMCTOBAT	ABARTENDE	SO003693	Planned	1/18/2017	1/18/2017	1.000000 EA	0.000000	0.000000 USA Barten...
RO	0000016	539 580	HUSQVARNA	SO003694	Planned	5/25/2017	5/25/2017	150,000.00... EA	0.000000	0.000000 Husqvarna ...
RO	0000044	539 580			Planned	6/30/2017	6/30/2017	1,950,000.0... EA	0.000000	0.000000
RO	0000046	AMSINGLE...	ABARTENDE	SO003696	Planned	4/19/2017	4/19/2017	1.000000 EA	0.000000	0.000000 USA Barten...
RO	0000047	AMBASE			Planned	4/17/2017	4/17/2017	1.000000 EA	0.000000	0.000000
RO	0000103	AMBASE	ABARTENDE	SO003701	Planned	5/10/2017	5/10/2017	1.000000 EA	0.000000	0.000000 USA Barten...
RO	0000144	AMBASE			Planned	5/3/2017	5/3/2017	1.000000 EA	0.000000	0.000000
RO	0000145	AMPCEB			Planned	5/3/2017	5/3/2017	19.000000 EA	0.000000	0.000000

LABOR COST (\$)

994

MACHINE COST (\$)


1.55K

QUANTITY TREND

0

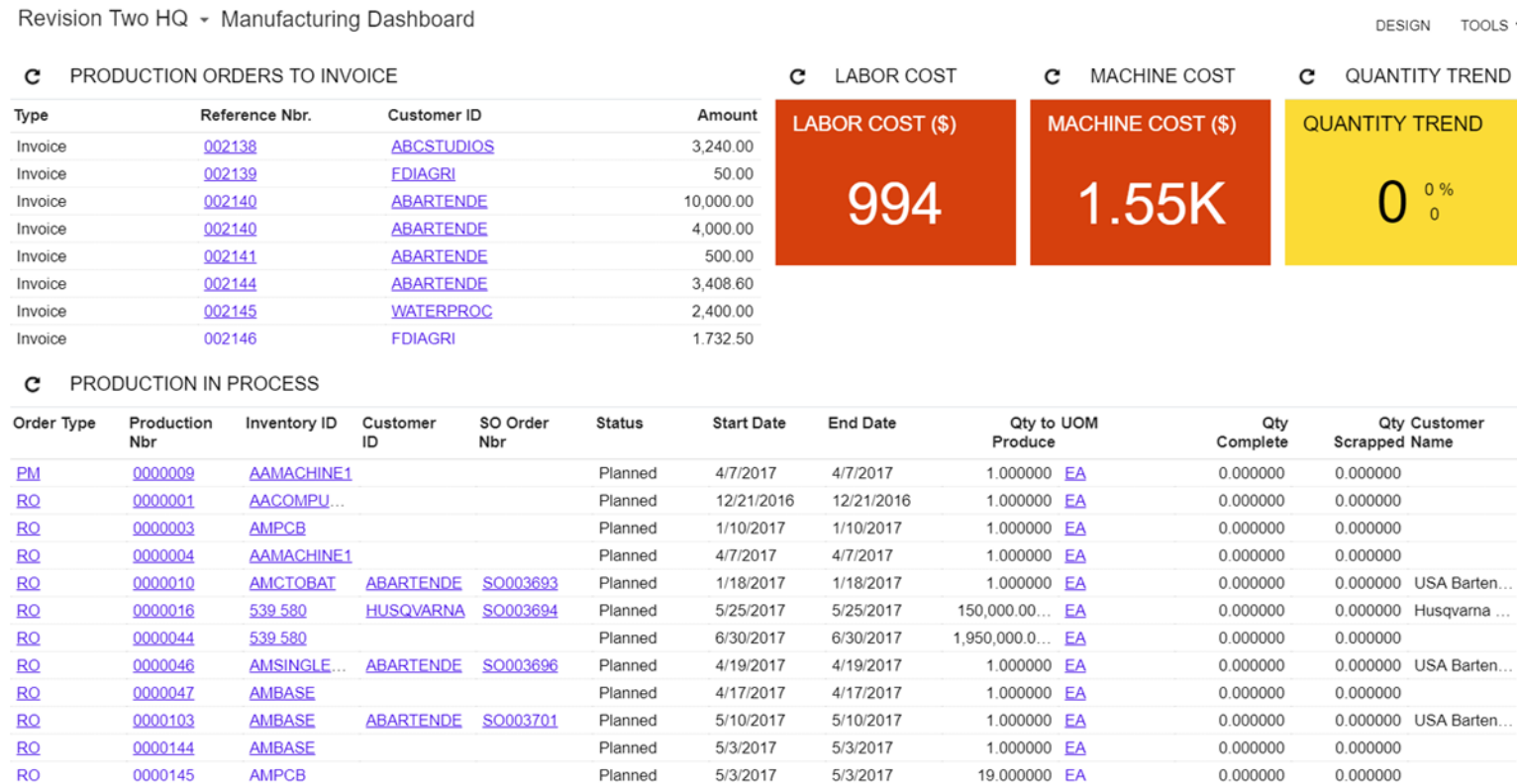
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 **Acumatica**
The Cloud ERP

Manufacturing Dashboard

- Production managers using Acumatica MFG Edition will have visibility into the production process in real-time by using Dashboards, Reports, and other built-in analytics
- This dashboard shows key examples for Manufacturers including Production In Process, Labor Costs, Machine Costs, and Production Orders to Invoice



Stock Item Record for Finished Good

- Navigate to the **Stock Item** record of the finished good (*Note: in my example the item is AMBASE, but you should use your prospect's item*)
- Explain appropriate features for prospect on General Settings tab including **Item Classes, Lot & Serial Support, and UOM conversions**
- **Manufacturing tab**
 - These are your Production settings (**Default BOM, Lot Size, Min/Max Qtys**)
 - When the Source=Manufacturing, the system will know to generate Production Orders to meet the demand for this item
 - Drill into Default BOM ID

Revision Two HQ ▾ Stock Items NC

← SAVE & CLOSE 📄 ↶ + 🗑️ ⏪ < > ⏩ ACTIONS ▾ INQUIRIES ▾

* Inventory ID: AMBASE - Base Unit Product Workgroup:
Item Status: Active ▾ Product Manager:
Description: Base Unit

GENERAL SETTINGS | PRICE/COST INFO | **MANUFACTURING** | WAREHOUSE DETAILS | VENDOR DETAILS | ATTRIBUTES

ITEM DEFAULTS

* Item Class: JAMS - Manufacture Item ✎
Type: Subassembly ▾
 Is a Kit

Valuation Method: Average ▾

* Tax Category: EXEMPT - Exempt Tax Category ✎
* Posting Class: ELE - Electronics & Computers ✎
* Lot/Serial Class: NOTTRACKED - Not Tracked ✎

Auto-Incremental Value:

UNIT OF MEASURE

* Base Unit: EA ✎
* Sales Unit: EA ✎
* Purchase Unit: EA ✎

+ **×** **÷**

*From Unit	Multiply/Divid	Conversion Factor	To Unit

WAREHOUSE DEFAULTS

Default Warehouse: WHOLESALE - HQ Wholesale Wareh ✎
Default Issue From: R1S1 - Row 1 Shelf 1 ✎
Default Receipt To: R1S1 - Row 1 Shelf 1 ✎

PHYSICAL INVENTORY

PI Cycle: ✎
ABC Code: ✎

Bill of Materials (BOM)

Notes for user

- You will spend a good amount of your demo time on the BOM because configuring BOMs correctly is key to calculating labor, materials, and costs during the production process
- You can think of the BOM as a “template” or “recipe” for production – what steps do we need to take and what materials do we need to use in order to produce the finished good?

Revision Two HQ - Bill of Material

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

SAVE & CLOSE + - < > ACTIONS REPORTS

BOM ID: 0000002 - Revision: B Active

Inventory ID: AMBASE - Base Unit Eff. Start Date: 3/23/2017

Warehouse: WHOLESALE - HQ Wholesale Warehou Eff. End Date: 6/6/2079

Description:

* Oper Nbr	* Work Center	Oper Desc	* Setup Time	Run Units	* Run Time	Machine Units	* Machine Time	* Queue Time	Backflush Labor	Scrap Action
0010	WC40	Cutting	01:00	10.000000	01:00	0.000000	01:00	00:00	<input checked="" type="checkbox"/>	No Action
0020	WC50	Form	01:00	0.000000	01:00	20.000000	01:00	00:00	<input checked="" type="checkbox"/>	No Action
0030	WC100	Inspection	00:00	10.000000	01:00	0.000000	01:00	00:00	<input checked="" type="checkbox"/>	No Action

MATERIALS STEPS TOOLS OVERHEAD

* Inventory ID	Description	Qty Required	Unit Cost	* UOM
AMSHEET10	Sheet Metal 10 Gauge	0.010000	10.00	POUND
AMBLACKDYE	Black Dye	1.000000	0.01	OZ

Bill of Materials (BOM)

- 1) Summary section of BOM – Finished Good the BOM is for, Warehouse specific, Revision specific, based on Effective Start and End dates
- 2) Center of the BOM are your Operation Numbers or “routing steps” – the steps that must be completed to produce the finished good
 - Configuring **Setup Time, Run Units/Time, Machine Units/Time, Scrap Actions, and Backflush** rules for each operation is key to calculating time and labor costs across the production cycle
- 3) Each operation number (each line) is tied to the four tabs at the bottom of the screen:
 - 1) **Materials**
 - 2) **Steps**
 - 3) **Tools**
 - 4) **Overhead**
- 4) Each operation line is also tied to a **Work Center** (drill into a Work Center to show the settings that are used each time that Work Center is used on a BOM – Shift Info/Labor Codes, Overhead, Machines, Standard Costs, Scrap Action Default, Backflush Materials/Labor)

Bill of Materials (BOM)

- **Materials tab**

- The material or component quantities needed in order to complete the associated operation
- If “Backflush” is checked for a component part, then material transactions will be automatically generated upon completion of production and those materials/components will be depleted from inventory
- Material Type: Regular or Phantom (Phantom is typically selected for small subassemblies that don’t require a separate production order)

- **Steps tab**

- The steps that need to be taken in order to complete the associated operation
- Can be printed to the Production Ticket or “job traveler” to provide instruction to those on the shop floor

- **Tools tab**

- Used to track any tools required to produce the BOM

- **Overhead tab**

- Overhead to apply for the associated operation
- Can be Fixed, Variable by Labor Cost or Labor Hours, Variable by Material, Variable by Machine Hours, Variable by Quantity Completed, or Variable by Total Quantity
- Tied to Cost Rates, GL Accounts, and Subaccounts

Production Order Methods

Notes for user

During your discovery call with your prospect, you should determine what method of production they use internally. Then, during your demo, you should only show the required production method(s). Examples included in this presentation are:

- Make-to-Stock
- Make-to-Order
- Configure-to-Order

Make-to-Stock Example

Production Order Maintenance

Manufacturers that produce using the Make-to-Stock method do not typically require the use of Sales Orders during the production process, so start with a Production Order

- 1) **Production Orders Workspace > New Production Orders**
 - Create a **new Production Order** for the finished good
- 2) Default BOM will be pulled in with associated labor, material, and cost settings we reviewed earlier (**References** tab)
- 3) Apply quantity to produce (**General** tab)
- 4) Save
- 5) **Actions > Release**
- 6) Review **Totals Tab** and **Event History Tab**

Revision Two HQ ▾ Production Order Maintenance ★

← SAVE & CLOSE 📄 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾ INQUIRIES ▾

* Order Type:	RO	* Order Date:	1/11/2018
* Production Nbr:	0000215 -	Status:	Planned <input type="checkbox"/> Hold
* Inventory ID:	AMBASE - Base Unit	Product Workgroup:	
* Warehouse:	WHOLESALE - HQ Wholesale Wareh	Product Manager:	
* Location:	R1S1 - Row 1 Shelf 1		
Description:			

GENERAL REFERENCES EVENT HISTORY ATTRIBUTES TOTALS

Qty to Produce:	20.000000	Scheduling Method:	Start On
* UOM:	EA	* Constraint:	1/11/2018
Qty Complete:	0.000000	Start Date:	1/11/2018
Qty Scrapped:	0.000000	End Date:	1/11/2018
Qty Remaining:	20.000000	<input type="checkbox"/> Use Fixed Mfg Lead Times for Order Dates	
		<input type="checkbox"/> Use Order Start Date for MRP	
		<input type="checkbox"/> Exclude from MRP	
		Dispatch Priority:	5

Production Order Maintenance

REPORTS > Production Ticket

- The Production Ticket, often referred to as the “Job Traveler” is usually printed on the shop floor and lists the **Operations, Workcenters, Materials, Steps,** etc that are required to complete the Production Order

Production Ticket

Company: Revision Two HQ
User: admin, admin

Production Nbr.:	0000215	Type:	RO	Order Date:	1/11/2018
Inventory ID:	AMBASE Base Unit			Start Date:	1/11/2018
Qty to Prod:	1.000000	EA		End Date:	1/11/2018

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0010	WC40	Pcs/Hr: 0.000000	01:00	1/11/2018	1/11/2018	
	Cutting					
						AMSHEET10 Sheet Metal 10 Guage
						AMBLACKDYE Black Dye

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0020	WC50	Pcs/Hr: 0.000000	01:00	1/11/2018	1/11/2018	
	Form					
						AMDRIPTRAY Drip Tray
						AMFHSCREW Flat Head Screw

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0030	WC100	Pcs/Hr: 0.000000	00:00	1/11/2018	1/11/2018	
	Inspection					

INQUIRIES > Production Detail

- The Production Details shows the detailed BOM information for that specific Production Order
- You can make changes to the Production Detail if necessary

Production Order Reports

At any time throughout the production process, users can return to dashboards or reports in order gain visibility into the current status of the production.

- **Production Summary**
- **Work in Process Report**
- **Work Center Dispatch**
- **Production Order Performance**

Revision Two HQ ▾ Production Order Maintenance ★

← SAVE & CLOSE 📄 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾ INQUIRIES ▾

* Order Type:	RO	* Order Date:	1/11/2018
* Production Nbr:	0000215 -	Status:	Planned <input type="checkbox"/> Hold
* Inventory ID:	AMBASE - Base Unit	Product Workgroup:	
* Warehouse:	WHOLESALE - HQ Wholesale Wareh	Product Manager:	
* Location:	R1S1 - Row 1 Shelf 1		
Description:			

GENERAL REFERENCES EVENT HISTORY ATTRIBUTES TOTALS

Qty to Produce:	20.000000	Scheduling Method:	Start On
* UOM:	EA	* Constraint:	1/11/2018
Qty Complete:	0.000000	Start Date:	1/11/2018
Qty Scrapped:	0.000000	End Date:	1/11/2018
Qty Remaining:	20.000000	<input type="checkbox"/> Use Fixed Mfg Lead Times for Order Dates	
		<input type="checkbox"/> Use Order Start Date for MRP	
		<input type="checkbox"/> Exclude from MRP	
		Dispatch Priority:	5

Production Order Maintenance

Notes for user

The next step in your demo depends on if the prospect is BACKFLUSHING their labor and materials or not.

- **If the prospect does NOT backflush, you will enter Labor and Material transactions next**
- **If the prospect DOES backflush, you will enter a Move transaction next** (a Move transaction automatically generates the Material and Labor transactions for a specific BOM/production order)

Production Orders - All Items

☆ Favorites

⚖ Finance

✍ Sales Orders

🛒 Purchases

🚚 Inventory

🏠 Bills of Material

🚚 **Production Orders**

🛒 Material Requirem...

📝 New Production Orders

➔ Release Production Orders

📄 Print Production Tickets

⊕ Issue Materials

Transactions

Labor

Move

Materials

WIP Adjustment

Unreleased PO Receipts

Configuration

Production Preferences

Audit

Material Transactions by Order

Labor Transactions by Order

Production Batch Register

Processes

Release Production Orders

Release AM Documents










Close Production Orders


Labor Transaction Example

For a prospect who does not Backflush, enter a Labor Transaction and/or Material transaction

- On the **Labor screen**, enter the labor lines in the detail section at the bottom
- Select the **Production #** you are adding labor to, the **Labor hours** spent, the **Shift**, etc
- Follow the same process for a Material transaction on the **Materials screen** if necessary
- Return to the Production Order to show the transactions have been added under the Event History tab and Totals tab

Revision Two HQ ▾ Labor ★











 RELEASE

Batch Nbr: 
 Total Qty.: 0.000000







Status:





 Hold

* Date: ▾

* Post Period: 

Description:




 ALLOCATIONS ATTRIBUTES 



			Labor Type	Order Type	Produc Nbr	Oper Nbr.	Inventory ID	Labor Code	* Labor Time	* Shift
>			Direct	RO	0000...	0010	AMBASE	DIRLAB	02:00	0001

Move Transaction

- A move transaction is how you “move” from one Operation or routing step to the next when **BACKFLUSHING** (Ex: The Cutting process is complete, so we are moving on to the Forming process)
- You **MUST** create a Move transaction for the **LAST** operation in order to complete production and close the Production Order when **BACKFLUSHING**. (If a prospect does not backflush, they can perform a move through labor transactions)
 - Users are not required to enter a Move transaction for each operation, unless the prospect’s business rules require it
- Enter the details of the **MOVE** in the details section, as shown in the screenshot
- **RELEASE** the transaction
- Return to Production Order to show that it has been closed, and the associated transactions have been added under the **Event History** tab based on the Move

Revision Two HQ ▾ Move ★

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Batch Nbr: 0000038 Total Qty.: 5.000000
Status: Balanced
 Hold
• Date: 1/15/2018 ▾
• Post Period: 01-2018
Description:

🔄 + ✕ ALLOCATIONS ATTRIBUTES ⏪ ☒ 📄

*Order Type	*Production Nbr	*Inventory ID	*Oper Nbr.	Quantity	*Warehouse
RO	0000217	AMBASE	0030	5.000000	WHOLESALE

SELECT 🔄 ⏪

Oper Nbr	Operation Description	Work Center
0010	Cutting	WC40
0020	Form	WC50
> 0030	Inspection	WC100

Make-to-Order Example

Make to Order

Manufacturers that use the Make-to-Order method typically start with a Sales Order and then link that Sales Order to the Production Order(s) needed to fulfill it

- Sales Orders Workspace > New Sales Order
 - Create a **new Sales Order** for the finished good you have been working with (Save)
- Click **Actions > Production Orders**
- Select the line item(s) you will be producing, **Add & Close**
- Will see the new Production Order gets linked to the Sales Order Line (highlighted in screenshot); drill into the Production Nbr

Revision Two HQ ▾ Sales Orders ★

← SAVE & CLOSE 📁 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾ REPORT

* Order Type:	<input type="text" value="SO"/>	* Customer:	<input type="text" value="ABARTENDE - USA Bartending Schc"/>	Ordered Qty
Order Nbr.:	<input type="text" value="SO003712"/>	* Location:	<input type="text" value="MAIN - Primary Location"/>	VAT Exempt
<input type="checkbox"/> Hold		Currency:	<input type="text" value="USD"/> 1.00 ▾ VIEW BASE	VAT Taxable
Status:	Open	<input type="checkbox"/> Credit Hold		Tax Total:
* Date:	<input type="text" value="1/15/2018"/> ▾	* Project:	<input type="text" value="X - Non-Project Code."/>	Order Total:
* Requested On:	<input type="text" value="1/15/2018"/> ▾	Description:	<input type="text"/>	
Customer Order:	<input type="text"/>			
External Refer...:	<input type="text"/>			

DOCUMENT DETAILS ESTIMATES TAX DETAILS COMMISSIONS FINANCIAL SETTINGS PAYM

↻ + ✎ ✕ ALLOCATIONS ADD INVOICE ADD STOCK ITEM PO LINK INVENTORY SUM

	*Branch	*Inventory ID	Line Description	*UOM	Quantity	Unit Price	Prod. Order Type	Production Nbr
>	HQ	AMBASE	Base Unit	EA	5.000000	500.00	RO	0000217










Production Order Maintenance








Actions > Release Order

Review the Production Order that has been generated from the Sales Order

- **General tab** – Qty to produce, Constraint Date vs Order Date
- **References tab** – refers back to the SO we started with, Source=BOM ID we reviewed earlier
- **Event History tab** – will see all transactions related to the Production Order here
- **Totals tab** – Planned vs Actual (Variance)

Revision Two HQ Production Order Maintenance

SAVE & CLOSE          ACTIONS ▾ INQUIRIES ▾

* Order Type:	RO	 	* Order Date:	1/15/2018 ▾	
* Production Nbr:	0000217 -		Status:	Released	<input type="checkbox"/> Hold
* Inventory ID:	AMBASE - Base Unit		Product Workgroup:		
* Warehouse:	WHOLESALE - HQ Wholesale Warehou		Product Manager:		
* Location:	R1S1 - Row 1 Shelf 1	 			
Description:					

GENERAL REFERENCES EVENT HISTORY ATTRIBUTES TOTALS

Qty to Produce:	5.000000	Scheduling Method:	Finish On ▾
* UOM:	EA	* Constraint:	1/14/2018 ▾
Qty Complete:	0.000000	Start Date:	1/12/2018
Qty Scrapped:	0.000000	End Date:	1/12/2018
Qty Remaining:	5.000000	<input type="checkbox"/> Use Fixed Mfg Lead Times for Order Dates	

Production Order Maintenance

REPORTS > Production Ticket

- The Production Ticket, often referred to as the “Job Traveler” is usually printed to be used the shop floor and lists the **Operations, Workcenters, Materials, Steps**, etc that are required to complete the Production Order

Production Ticket

Company: Revision Two HQ
User: admin, admin

Production Nbr.:	0000215	Type:	RO	Order Date:	1/11/2018
Inventory ID:	AMBASE			Start Date:	1/11/2018
	Base Unit			End Date:	1/11/2018
Qty to Prod:	1.000000	EA			

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0010	WC40	Pcs/Hr: 0.000000	01:00	1/11/2018	1/11/2018	
Cutting						
						AMSHEET10 Sheet Metal 10 Guage
						AMBLACKDYE Black Dye

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0020	WC50	Pcs/Hr: 0.000000	01:00	1/11/2018	1/11/2018	
Form						
						AMDRIPTRAY Drip Tray
						AMFHSCREW Flat Head Screw

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0030	WC100	Pcs/Hr: 0.000000	00:00	1/11/2018	1/11/2018	
Inspection						

INQUIRIES > Production Detail

- The Production Details shows the detailed BOM information for that specific Production Order
- You can make changes to the Production Detail if necessary

Production Order Reports

At any time throughout the production process, users can return to dashboards, reports, and inquiries in order gain visibility into the current status of production

Reports:

- **Production Summary**
- **Work in Process**
- **Work Center Dispatch**
- **Production Order Performance**

Revision Two HQ ▾ Production Order Maintenance ★

← SAVE & CLOSE 📄 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾ INQUIRIES ▾

* Order Type:	RO	* Order Date:	1/11/2018
* Production Nbr:	0000215 -	Status:	Planned <input type="checkbox"/> Hold
* Inventory ID:	AMBASE - Base Unit	Product Workgroup:	
* Warehouse:	WHOLESALE - HQ Wholesale Wareh	Product Manager:	
* Location:	R1S1 - Row 1 Shelf 1		
Description:			

GENERAL REFERENCES EVENT HISTORY ATTRIBUTES TOTALS

Qty to Produce:	20.000000	Scheduling Method:	Start On
* UOM:	EA	* Constraint:	1/11/2018
Qty Complete:	0.000000	Start Date:	1/11/2018
Qty Scrapped:	0.000000	End Date:	1/11/2018
Qty Remaining:	20.000000	<input type="checkbox"/> Use Fixed Mfg Lead Times for Order Dates	
		<input type="checkbox"/> Use Order Start Date for MRP	
		<input type="checkbox"/> Exclude from MRP	
		Dispatch Priority:	5

Production Order Maintenance

Notes for user

The next step in your demo depends on if the prospect is BACKFLUSHING their labor and materials or not.

- **If the prospect does NOT backflush, you will enter Labor and Material transactions next**
- **If the prospect DOES backflush, you will enter a Move transaction next** (a Move transaction automatically generates the Material and Labor transactions for a specific BOM/production order)

Production Orders - All Items

New Production Orders Release Production Orders Print Production Tickets Issue Materials

Transactions

- Labor
- Move
- Materials
- WIP Adjustment
- Unreleased PO Receipts

Audit

- Material Transactions by Order
- Labor Transactions by Order
- Production Batch Register

Configuration

- Production Preferences

Processes










- Release Production Orders
- Release AM Documents
- Close Production Orders


Labor Transaction Example

For a prospect who does not Backflush, enter a Labor Transaction and/or Material transaction

- On the **Labor screen**, enter the labor lines in the detail section at the bottom
- Select the **Production #** you are adding labor to, the **Labor hours** spent, the **Shift**, etc
- Follow the same process for a Material transaction on the **Materials screen** if necessary
- Return to the Production Order to show the transactions have been added under the Event History tab and Totals tab

Revision Two HQ ▾ Labor ★











 RELEASE

Batch Nbr: 
 Total Qty.: 0.000000







Status:





 Hold

* Date: ▾

* Post Period: 

Description:




 ALLOCATIONS ATTRIBUTES 



			Labor Type	Order Type	Produc Nbr	Oper Nbr.	Inventory ID	Labor Code	* Labor Time	* Shift
>			Direct	RO	0000...	0010	AMBASE	DIRLAB	02:00	0001

Move Transaction

- A move transaction is how you “move” from one Operation or routing step to the next when **BACKFLUSHING** (Ex: The Cutting process is complete, so we are moving on to the Forming process)
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 - Users are not required to enter a Move transaction for each operation, unless the prospect’s business rules require it
- Enter the details of the **MOVE** in the details section, as shown in the screenshot
- **RELEASE** the transaction
- Return to Production Order to show that it has been closed, and the associated transactions have been added under the **Event History** tab based on the Move

Revision Two HQ ▾ Move ★

📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ RELEASE

Batch Nbr: 0000038 Total Qty.: 5.000000
Status: Balanced
 Hold
• Date: 1/15/2018 ▾
• Post Period: 01-2018
Description:

🔄 + ✕ ALLOCATIONS ATTRIBUTES ⏪ ☒ 📄

*Order Type	*Production Nbr	*Inventory ID	*Oper Nbr.	Quantity	*Warehouse
RO	0000217	AMBASE	0030	5.000000	WHOLESALE

SELECT 🔄 ⏪

Oper Nbr	Operation Description	Work Center
0010	Cutting	WC40
0020	Form	WC50
> 0030	Inspection	WC100

Configure-to-Order Example

Configure to Order

Product Configurator Workspace> Configuration Maintenance > select a Configuration ID

- The **Configuration Maintenance** screen is where you define the **Features, Attributes, Options, Rules** and more for your configurable items

Product Configurator Workspace> Configurator Preferences

- You set pricing rules and numbering sequences for the Product Configurator on the **Configurator Preferences** screen

Configuration ... 0000002 ⓘ * BOM ID: 0000006 - ⓘ
* Revision: A ⓘ Inventory ID: AMCTOBAT - Custom Wooden Bat - for ⓘ
Status: Active ▾ Completion Required Before Production
Description: Configure to order wood bat

FEATURES ATTRIBUTES KEYS PRICE

Feature ID	Label	Description	Sort Order	Min Selection	Max Selection	Min Qty	Max Qty
CTOBATHANDLECOLOR	CTOBATHANDLECOLOR	Bat Handle Color	1	1	1		
CTOBATBODYCOLOR	CTOBATBODYCOLOR	Bat Body Color	2	1	1		
CTOBATENGCOLOR	CTOBATENGCOLOR	Bat Engraving Color	3	1	1		
CTOBATWOOD	CTOBATWOOD	Wood Selection	4	1	1		

OPTIONS **RULES**

Rule	Source Option	Target Feature	Target Option
Exclude	Black Body	CTOBATENGCOLOR	Black Lettering
Exclude	Blue Body	CTOBATENGCOLOR	Blue Lettering
Exclude	Gold Body	CTOBATENGCOLOR	Gold Lettering

GENERAL

* Config Numbering Sequence: AMCONFIG ⓘ ⓘ
* Default Revision: A
Config Key Format: No Keys ▾
Default Key Number Sequence: ⓘ ⓘ
 Completion Required Before Production

PRICE

Hide Price Details

Rollup: Children All ▾
 Override Default on Configuration

Calculate: After Selection ▾
 Override Default on Configuration

Configure to Order

Manufacturers that use the Configure-to-Order method typically start with a Sales Order and then link that Sales Order to the Production Order(s) needed to fulfill it

- Sales Orders Workspace > New Sales Order
 - Create a **new Sales Order** for a Configurable item (in the demo data, **AMCTOBAT** is a Custom Wooden Bat)
- When you Save the Sales Order, you will see the **CONFIGURE** button becomes available – Click **CONFIGURE** to launch the Configuration Entry screen

The screenshot displays the Acumatica Sales Order workspace. At the top, it shows 'Revision Two HQ - Sales Orders' with navigation icons for 'SAVE & CLOSE', 'undo', 'redo', 'add', 'delete', 'refresh', 'back', 'home', 'forward', and 'actions/reports'. The form contains the following fields:

- Order Type: SO
- Order Nbr.: SO003713
- Customer: ABARTENDE - USA Bartending Schc
- Location: MAIN - Primary Location
- Currency: USD 1.00
- Status: Open
- Date: 1/15/2018
- Requested On: 1/15/2018
- Project: X - Non-Project Code
- Ordered Qty.: 1.000000
- VAT Exempt T...: 0.00
- VAT Taxable T...: 0.00
- Tax Total: 0.00
- Order Total: 0.00

Below the form is a navigation bar with tabs: DOCUMENT DETAILS, ESTIMATES, TAX DETAILS, COMMISSIONS, FINANCIAL SETTINGS, PAYMENT SETTINGS, SHIPPING S. A 'CONFIGURE' button is highlighted in blue, with a tooltip that says 'Launch configuration entry'. Below this is a table with the following data:

Branch	Inventory ID	Line Description	UOM	Quantity	Unit Price	Prod. Order Type	Production Nbr	Dis Co
HQ	AMCTOBAT	Custom Woo...	EA	1.000000	0.00			WHOLESALE

Configuration Entry

The pane on the Left hand side of the Configuration Entry screen shows the Features (or “Questions”) and the right hand side shows the Attributes and Options (or “Answers” to the questions)

- When you check (select) an option and the Configuration rules have been met, a green checkmark will appear to indicate you can move on to the next one
- The Price of the item will change depending on the Options you select
 - Pricing rules are determined on the **Configurator Preferences** screen
- When all required Options have been selected, click **“FINISH”** and the custom configuration options get tagged to the line item
- From the Sales Order, select **ACTIONS > Production Orders** to create associated Production order
 - Select the line item(s) you will be producing, **Add & Close**
- Will see the new Production Order gets linked to the Sales Order Line; drill into the Production Order

Configuration Entry

Revision Two HQ Configuration Entry CUSTOMIZATION

SAVE & CLOSE FINISH

CTOBATHANDLECOLO Natural Handle
CTOBATBODYCOLOR
CTOBATENGCOLOR
CTOBATWOOD

Inventory ID: AMCTOBAT - Custom Wooden
 Completed

Currency: USD 1.00

Price: 0.0000

ATTRIBUTES OPTIONS

FEATURE

Min/Max Selection: 1 / 1
Min/Lot/Max Qty: None / None / None
Total Qty: 0.000000

SELECTED OPTION

Min/Lot/Max Qty: None / None / None

SHOW ALL

Include	Label	Description	Qty
<input checked="" type="checkbox"/>	Natural Body	Natural Stain - for AMCTO...	0.030000
<input type="checkbox"/>	Black Body	Black Paint - for AMCTOB...	0.030000
<input type="checkbox"/>	Red Body	Red Paint - for AMCTOBAT	0.030000










Production Order Maintenance

Actions > Release Order

Review the Production Order that has been generated from the Sales Order. Configuration details will be attached.

- **General tab** – Qty to produce, Constraint Date vs Order Date
- **References tab** – refers back to the SO we started with, Source=Configuration
 - Click **CONFIGURE** button to review the Configuration details
- **Event History tab** – will see all transactions related to the Production Order here
- **Attributes tab** – the configurable attribute details that you selected
- **Totals tab** – Planned vs Actual (Variance)

Revision Two HQ Production Order Maintenance

SAVE & CLOSE          ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

* Order Type:	RO	* Order Date:	1/16/2018
* Production Nbr:	0000220	Status:	Planned <input type="checkbox"/> Hold
* Inventory ID:	AMCTOBAT - Custom Wooden Bat	Product Workgroup:	
* Warehouse:	WHOLESALE - HQ Wholesale Wareh	Product Manager:	
* Location:	R1S1 - Row 1 Shelf 1	Description:	

GENERAL **REFERENCES** EVENT HISTORY ATTRIBUTES TOTALS

SO REFERENCES		SOURCE	
Customer:	ABARTENDE - USA Bartending School	Source:	Configuration
SO Order Type:	SO	* Source Date:	1/16/2018
SO Order Nbr:	SO003714	Configuration ID:	0000002
SO Line Nbr.:	1	Conf. Revision:	A
LINKED ORDERS		Config. Key:	
Product Order Type:		CONFIGURE DELETE CONFIG.	
Product Order:			
Parent Order Type:			

Production Order Maintenance

REPORTS > Production Ticket

- The Production Ticket, often referred to as the “Job Traveler” is usually printed on the shop floor and lists the **Operations, Workcenters, Materials, Steps**, etc that are required to complete the Production Order

INQUIRIES > Production Detail

- The Production Details shows the detailed BOM information for that specific Production Order
- You can make changes to the Production Detail if necessary

Production Ticket

Company: Revision Two HQ
User: admin, admin

Production Nbr.:	0000215	Type:	RO	Order Date:	1/11/2018
Inventory ID:	AMBASE Base Unit			Start Date:	1/11/2018
Qty to Prod:	1.000000	EA		End Date:	1/11/2018

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0010	WC40	Pcs/Hr: 0.000000	01:00	1/11/2018	1/11/2018	
	Cutting					
						AMSHEET10 Sheet Metal 10 Guage
						AMBLACKDYE Black Dye

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0020	WC50	Pcs/Hr: 0.000000	01:00	1/11/2018	1/11/2018	
	Form					
						AMDRIPTRAY Drip Tray
						AMFHSCREW Flat Head Screw

Operation	Workcenter	Run Time	Setup Time	Start Date	End Date	InventoryItem/Description
0030	WC100	Pcs/Hr: 0.000000	00:00	1/11/2018	1/11/2018	
	Inspection					

Production Order Reports

At any time throughout the production process, users can return to dashboards, reports, and inquiries in order gain visibility into the current status of production

Reports:

- **Production Summary**
- **Work in Process**
- **Work Center Dispatch**
- **Production Order Performance**

Revision Two HQ ▾ Production Order Maintenance ★

← SAVE & CLOSE 📄 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾ INQUIRIES ▾

* Order Type:	RO	* Order Date:	1/11/2018
* Production Nbr:	0000215 -	Status:	Planned <input type="checkbox"/> Hold
* Inventory ID:	AMBASE - Base Unit	Product Workgroup:	
* Warehouse:	WHOLESALE - HQ Wholesale Wareh	Product Manager:	
* Location:	R1S1 - Row 1 Shelf 1		
Description:			

GENERAL REFERENCES EVENT HISTORY ATTRIBUTES TOTALS

Qty to Produce:	20.000000	Scheduling Method:	Start On
* UOM:	EA	* Constraint:	1/11/2018
Qty Complete:	0.000000	Start Date:	1/11/2018
Qty Scrapped:	0.000000	End Date:	1/11/2018
Qty Remaining:	20.000000	<input type="checkbox"/> Use Fixed Mfg Lead Times for Order Dates	
		<input type="checkbox"/> Use Order Start Date for MRP	
		<input type="checkbox"/> Exclude from MRP	
		Dispatch Priority:	5

Production Order Maintenance

Notes for user

The next step in your demo depends on if the prospect is BACKFLUSHING their labor and materials or not.

- **If the prospect does NOT backflush, you will enter Labor and Material transactions next**
- **If the prospect DOES backflush, you will enter a Move transaction next** (a Move transaction automatically generates the Material and Labor transactions for a specific BOM/production order)

Production Orders - All Items

☆ Favorites

⚖ Finance

✍ Sales Orders

🛒 Purchases

🚚 Inventory

🏠 Bills of Material

🚚 **Production Orders**

🛒 Material Requirem...

📝 New Production Orders

➔ Release Production Orders

📄 Print Production Tickets

⊕ Issue Materials

Transactions

Labor

Move

Materials

WIP Adjustment

Unreleased PO Receipts

Configuration

Production Preferences

Audit

Material Transactions by Order

Labor Transactions by Order

Production Batch Register

Processes

Release Production Orders

Release AM Documents










Close Production Orders


Labor Transaction Example

For a prospect who does not Backflush, enter a Labor Transaction and/or Material transaction

- On the **Labor screen**, enter the labor lines in the detail section at the bottom
- Select the **Production #** you are adding labor to, the **Labor hours** spent, the **Shift**, etc
- Follow the same process for a Material transaction on the **Materials screen** if necessary
- Return to the Production Order to show the transactions have been added under the Event History tab and Totals tab

Revision Two HQ ▾ Labor ★











 RELEASE

Batch Nbr: 
 Total Qty.: 0.000000







Status:





 Hold

* Date: ▾

* Post Period: 

Description:




 ALLOCATIONS ATTRIBUTES 



			Labor Type	Order Type	Produc Nbr	Oper Nbr.	Inventory ID	Labor Code	* Labor Time	* Shift
>			Direct	RO	0000...	0010	AMBASE	DIRLAB	02:00	0001

Move Transaction

- A move transaction is how you “move” from one Operation or routing step to the next when **BACKFLUSHING** (Ex: The Cutting process is complete, so we are moving on to the Forming process)
- You **MUST** create a Move transaction for the **LAST** operation in order to complete production and close the Production Order when **BACKFLUSHING**. (If a prospect does not backflush, they can perform a move through labor transactions)
 - Users are not required to enter a Move transaction for each operation, unless the prospect’s business rules require it
- Enter the details of the **MOVE** in the details section, as shown in the screenshot
- **RELEASE** the transaction
- Return to Production Order to show that it has been closed, and the associated transactions have been added under the **Event History** tab based on the Move

Revision Two HQ ▾ Move ★

📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ RELEASE

Batch Nbr: 0000038 Total Qty.: 5.000000
Status: Balanced
 Hold
• Date: 1/15/2018 ▾
• Post Period: 01-2018
Description:

🔄 + ✕ ALLOCATIONS ATTRIBUTES ⏪ ☒ 📄

*Order Type	*Production Nbr	*Inventory ID	*Oper Nbr.	Quantity	*Warehouse
RO	0000217	AMBASE	0030	5.000000	WHOLESALE

SELECT 🔄 ⏪

Oper Nbr	Operation Description	Work Center
0010	Cutting	WC40
0020	Form	WC50
> 0030	Inspection	WC100

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