Production Functionality

The Production functionality is activated by selecting the 'Activate Production' option under the Admin / Defaults / Manage Job Defaults / Preferences screen.

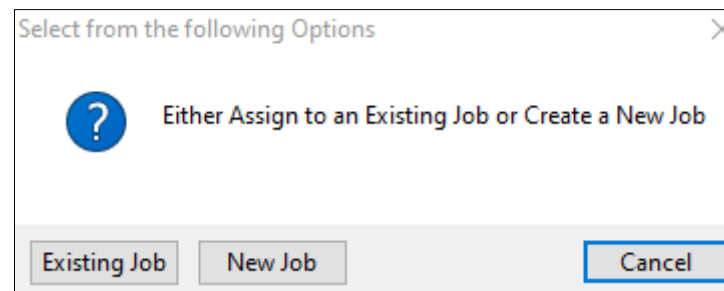## The Production Process for Kitsets set to be 'When Invoiced'.

The Production Function does not need to be turned on when the only kitsets being used are **When Invoiced** kitsets.

With the Production Function Not On

A Quote is created, with a combination of kitset and non-kitset products. The highlighted line is a **When Invoiced** kitset.

Code	
1000	Double Bed
1001	Queen Size Bed
1007	Dining Table and 8 Chairs

The Quote is assigned to a Job, it can be a New or an Existing Job.

Select from the following Options ✕

? Either Assign to an Existing Job or Create a New Job

Existing Job   New Job   Cancel

The **Assigned Quoted** button on the Manage Job screen will display the **Select / Enter Quantities to Assign to Job** screen.

The **Sell All** button is the only option on that screen when the Production function is not turned on.

This option to **Sell All** will remove the items from stock, including the kitset components. It will assign the items to the job so they are shown as invoiced to the customer.

Product Transactions - By Type
The Demonstration Company Ltd

Date	20/01/2021	20/01/2021	
Product Code	** Unassigne	ZZZZZZZZZZ	Product Type ** ALL Types **
Product Group	** Unassigne	ZZZZZZZZZZ	Location All Locations
Product Sub Group	** Unassigne	ZZZZZZZZZZ	

Date	Product Code	Description	Transaction	Reference	Quantity	Cost Value
Transaction Type : Invoice						
20/01/2021	1008	LCD Wall Bracket	Invoice Job 10131	Job 10131	-1.00	162.12
20/01/2021	1007	Dining Table and 8 Chairs	Invoice Job 10131	Job 10131	-3.00	1200.00
20/01/2021	1000	Double Bed	Invoice Job 10131	Job 10131	-1.00	525.00
20/01/2021	1001	Queen Size Bed	Invoice Job 10131	Job 10131	-2.00	1074.22
					-7.00	2961.34
Transaction Type : Create Kitset						
20/01/2021	1007	Dining Table and 8 Chairs	Create Kitset Job 10131	Job 10131	3.00	1200.00
					3.00	1200.00
Transaction Type : Produce Kitset						
20/01/2021	1005	Dining Table Rimu	Produce Kitset 1007	1007	-3.00	0.00
20/01/2021	1006	Chairs, Solid Back	Produce Kitset 1007	1007	-24.00	0.00
					-27.00	0.00

When Items from a Quote have been assigned to a job, they cannot be assigned a second time – even if the lines have been removed from the job. The software stores the quantities that have already been assigned.

					Sell All ☐
Code	Description	Qty	Rate	Qty to Sell	Previous Sell
1000	Double Bed	1.00	525.00	0.00	1.00
1001	Queen Size Bed	2.00	999.00	0.00	2.00
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	3.00

If new Items are added to the Quote or quantities on an existing line are increased, these can be assigned to the job using the same process.

Select / Enter Quantities to Assign to Job

					Sell All ☑	
Code	Description	Qty	Rate	Qty to Sell	Previous Sell	
1000	Double Bed	2.00	525.00	1.00	1.00	←
1001	Queen Size Bed	2.00	999.00	0.00	2.00	
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	3.00	
1008	LCD Wall Bracket	7.00	215.00	7.00	0.00	←

On the Manage Job screen, the extra item on the top line appears separately and the new line is below that.

Date	Code	Description	Quantity
21/01/2021	1000	Double Bed	1.00
21/01/2021	1001	Queen Size Bed	2.00
21/01/2021	1007	Dining Table and 8 Chairs	3.00
21/01/2021	1000	Double Bed	1.00
21/01/2021	1008	LCD Wall Bracket	7.00

If Quote lines are removed or quantities on the quote lines decreased, then they must be manually removed from the job so that the items (including kitset components) are returned to stock.

The job is invoiced, and the **Detail From** for the invoice will normally be **Quoted**.

Job Management Invoice Detail Settings

These settings will apply only to the current invoice. To change the default use the Job Defaults option under Admin / Settings.

Products	Full Detail
Cashbook	Full Detail
Suppliers	Full Detail
Staff	Full Detail
Disbursements	Full Detail

☑ Include Title
☑ Include Instructions
☐ Include Tech Notes
☑ Mark Job as Complete
☐ Use Job Charge To Details

Detail From   Quoted   Job has a Quote assigned

Preview

With the Production Function On.

As in the example above, a Quote is generated and then assigned to a Job.

The Assign Quoted button on the Manage Job screen will display the **Select / Enter Quantities to Assign to Job** screen, and now there are two options: Sell All and Build All.

Code	Description	Qty	Rate	Qty to Sell	Previous Sell	Qty to Build	Previous Build
1000	Double Bed	1.00	525.00	0.00	1.00	0.00	0.00
1001	Queen Size Bed	2.00	999.00	0.00	2.00	0.00	0.00
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	3.00	0.00	0.00

If **Sell All** is chosen, the job will display all the items are being Required and as being Sold i.e. the Quantity column is filled in.

Date	Code	Description	Qty Reqd	Qty Prev. Built	Qty to Build	Qty Built	Quantity
20/01/2021	1000	Double Bed	1.00				1.00
20/01/2021	1001	Queen Size Bed	2.00				2.00
20/01/2021	1007	Dining Table and 8 Chairs	3.00				3.00

The option to **Sell All** will remove the items from stock, including the kitset components. It will assign the items to the job so they are shown as invoiced to the customer.

When Items from a Quote have been assigned to a job, they cannot be assigned a second time, even if the lines have been removed from the job. The software stores the quantities that have already been assigned.

Select / Enter Quantities to Assign to Job

☐ Sell All

Code	Description	Qty	Rate	Qty to Sell	Previous Sell
1000	Double Bed	2.00	525.00	0.00	2.00
1001	Queen Size Bed	2.00	999.00	0.00	2.00
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	3.00
1008	LCD Wall Bracket	1.00	215.00	0.00	1.00

If new Items are added to the Quote or quantities on an existing line are increased, these can be assigned to the job using the same process.

Select / Enter Quantities to Assign to Job

☑ Sell All

Code	Description	Qty	Rate	Qty to Sell	Previous Sell	
1000	Double Bed	2.00	525.00	1.00	1.00	◄
1001	Queen Size Bed	2.00	999.00	0.00	2.00	
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	3.00	
1008	LCD Wall Bracket	7.00	215.00	7.00	0.00	◄

On the Manage Job screen, the extra item on the top line appears separately and the new line is below that.

Date	Code	Description	Qty Reqd	Qty Prev. Built	Qty to Build	Qty Built	Quantity
21/01/2021 ▼	1000	Double Bed	1.00				1.00
21/01/2021	1001	Queen Size Bed	2.00				2.00
21/01/2021	1007	Dining Table and 8 Chairs	3.00				3.00
21/01/2021	1000	Double Bed	2.00				1.00
21/01/2021	1008	LCD Wall Bracket	1.00				1.00

If Quote lines are removed or quantities on the quote lines decreased, then they must be manually removed from the job so that the items (including kitset components) are returned to stock.

The job is invoiced, and the **Detail From** for the invoice will normally be **Quoted.**

If **Build All** is chosen, the job will display all the items are being Required and to be Built. They will not display as Sold i.e. the Quantity column is not filled in.

Code	Description	Qty	Rate	Qty to Sell	Previous Sell	Qty to Build	Previous Build
1000	Double Bed	1.00	525.00	0.00	0.00	1.00	0.00
1001	Queen Size Bed	2.00	999.00	0.00	0.00	2.00	0.00
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	0.00	3.00	0.00

Select / Enter Quantities to Assign to Job — Sell All, Build All

Date		Code	Description	Qty Reqd	Qty Prev. Built	Qty to Build	Qty Built	Quantity
20/01/2021	▼	1000	Double Bed	1.00		1.00		
20/01/2021		1001	Queen Size Bed	2.00		2.00		
20/01/2021		1007	Dining Table and 8 Chairs	3.00		3.00		

The items have not been removed from stock. If any new Items or extra quantities are added to the Quote, these can be assigned to the job later. However, any items already assigned to the job cannot be reassigned to the job even if they are deleted from the job.

Select / Enter Quantities to Assign to Job — Sell All, Build All

Code	Description	Qty	Rate	Qty to Sell	Previous Sell	Qty to Build	Previous Build
1000	Double Bed	2.00	525.00	0.00	0.00	1.00	1.00
1001	Queen Size Bed	2.00	999.00	0.00	0.00	0.00	2.00
[1007]	Dining Table and 8 Chairs	3.00	1186.00	0.00	0.00	0.00	3.00
1048	Steel Tube	1.00	90.00	0.00	0.00	1.00	0.00

On the job the new line appears, and the line that had the quantity changed will display on a new separate line.

Date	Code	Description	Qty Reqd	Qty Prev. Built	Qty to Build
20/01/2021	1000	Double Bed	1.00		1.00
20/01/2021	1001	Queen Size Bed	2.00		2.00
20/01/2021	1007	Dining Table and 8 Chairs	3.00		3.00
20/01/2021	1000	Double Bed	2.00		1.00
20/01/2021	1048	Steel Tube	1.00		1.00

Any items that have been removed from the Quote or the quantities on the quote have been reduced, must be manually removed from the job.

The items now need to be sold to the customer. There is a **Sell All** button on the Manage Job screen, using this will remove the items, including the kitset components from stock.

Date	Code	Description	Qty Reqd	Qty Prev. Built	Qty to Build	Qty Built
20/01/2021	1001	Queen Size Bed	2.00		2.00	
20/01/2021	1007	Dining Table and 8 Chairs	3.00		3.00	
20/01/2021	1000	Double Bed	2.00		1.00	
20/01/2021	1048	Steel Tube	1.00		1.00	
20/01/2021						

Quote
Job Card
Invoices

Available Qty : 1.00
Bin :
(All Locations) : 35.00
On Order : 2.00

Delete Line | Insert Line | Production | ☐ Recurring
Authorise None | Authorise All | Sell All | ☐ Template

There is a prompt to select the Date for the items to come out of stock

It will also clear the column Qty Reqd on the Manage Job screen

Date	Code	Description	Qty Reqd	Qty Prev. Built	Qty to Build	Qty Built	Quantity
21/01/2021	1001	Queen Size Bed			2.00		2.00
21/01/2021	1007	Dining Table and 8 Chairs			3.00		3.00
21/01/2021	1000	Double Bed			1.00		2.00
21/01/2021	1048	Steel Tube			1.00		1.00

Product Transactions - By Type
The Demonstration Company Ltd

Date		21/01/2021	21/01/2021	
Product Code	** Unassigne	ZZZZZZZZZZ	Product Type	** ALL Types **
Product Group	** Unassigne	ZZZZZZZZZZ	Location	All Locations
Product Sub Group	** Unassigne	ZZZZZZZZZZ		

Date	Product Code	Description	Transaction	Reference	Quantity	Cost Value
Transaction Type : Invoice						
21/01/2021	1007	Dining Table and 8 Chairs	Invoice Job 10133	Job 10133	-3.00	1200.00
21/01/2021	1000	Double Bed	Invoice Job 10133	Job 10133	-2.00	1050.00
21/01/2021	1001	Queen Size Bed	Invoice Job 10133	Job 10133	-2.00	1074.22
21/01/2021	1048	Steel Tube	Invoice Job 10133	Job 10133	-1.00	0.00
21/01/2021	TTN	Labour NC - Ted Thompson	Invoice Job 10119	Job 10119	-0.50	18.75
21/01/2021	AJN	Labour NC - Amanda Johns	Invoice Job 10119	Job 10119	-1.00	37.50
					-9.50	3380.47
Transaction Type : Create Kitset						
21/01/2021	1007	Dining Table and 8 Chairs	Create Kitset Job 10133	Job 10133	3.00	1200.00
					3.00	1200.00
Transaction Type : Produce Kitset						
21/01/2021	1005	Dining Table Rimu	Produce Kitset 1007	1007	-3.00	0.00
21/01/2021	1006	Chairs, Solid Back	Produce Kitset 1007	1007	-24.00	0.00
					-27.00	0.00

There is an issue when the Sell All is used and the quote quantity was increased and split over two lines. The quantity that displays on the Manage Job screens is incorrect. To avoid this issue, users should add an extra line for the extra quantity, and that will result in the correct quantity going out of stock.

The job is invoiced, and the **Detail From** for the invoice will normally be **Quoted**.

When the **Build All** is chosen, the correct process is NOT for the user to use the **Build the Stock** button on the Manage Job screen. This is not intended for purchased / stock items nor for **When Invoiced Kitsets.**

Issues were noted during the testing.

- It receives into stock, items which are purchased items
- It does not remove the components for kitset items
- The PRODAUD is wrong if some items are built and then more items including kitset items are built, the audit trail is not correct. quote was 1, 2, 3 (3 being the kitset). I built 1 and 1, and put them into stock. Then I build the other 1 and 3 and put those into stock.