ArcFlow AI Enabled Cloud ERP Training & Support

Welcome to the ArcFlow ERP Training Guide. This comprehensive manual is crafted to provide you with the essential knowledge and skills to effectively use the ArcFlow ERP system. It includes detailed walkthrough documents and instructional videos on each module, as well as insights into the workflow dependencies between modules.

Whether you are new to ERP systems or seeking to deepen your expertise in ArcFlow's advanced features, this guide will lead you through each module, showing you how to streamline business processes, enhance productivity, and achieve seamless integration across all departments. Join us on this journey to master the tools and functionalities that will propel your organisations success.

Self Paced Training Guides

The training guide is organised into the various ArcFlow modules to facilitate easy navigation. Please select the dropdown menu to view the different sub-modules available. Once you have chosen a specific sub-module, you will be able to access detailed videos and comprehensive walkthrough documentation tailored to that sub-module, ensuring you have all the resources needed to master each aspect of the ArcFlow system. You can utilise the search bar at the top right of your screen to find specific training content.

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ArcFlow Real Time In-App Support

ArcFlow includes integrated app support functionality, enabling you to receive on-demand assistance during your daily operations and use of the ArcFlow system. ArcFlow engineers will provide real-time support through messaging, screen sharing, and audio features, ensuring your operations continue smoothly without disruptions.

- In-App Support

In-App Support Functionality

Company Wide Virtual Training

Should you wish to arrange a comprehensive virtual software training session for your entire company, we encourage you to reach out using the direct contact information provided below. Our team will work with you to schedule a convenient meeting date and time that aligns with your organisations needs and availability. We look forward to assisting you in optimising your team's proficiency with our software solution.

- Company Contacts

Contact 1: Sam Burditt

Email Address: sam.burditt@arcflow.co

Contact 2: Matthew Scott

Email Address: matt.scott@arcflow.co

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- ArcFlow System Overview
- ArcFlow Description
- ArcFlow is an AI Enabled Cloud ERP System which offers manufacturers the ability to streamline operations and enhance efficiency and productivity.

- The system offers automation capabilities through real time flow of data between the different modules. Whilst going through the training documentation, diagrams are provided to outline the workflows and flow of data between the different modules and sub modules.
- ArcFlow Introduction Video
- FinalVideoUK.mp4
- ArcFlow Modules and Sub Modules
- ArcFlow includes the following Modules and Sub Modules listed below:
- Blueprints
    - Library
    - Routing
- Sales
    - Sales Personnel
    - Customer Management
    - Sales Order Management
    - Customer Returns
    - Sales Configurations
    - Warranties
    - Sales History
    - Dashboard
- Procurement
    - Create Material Order
    - Manage Orders
    - Vendors/Manufacturers
    - Dashboard
- Warehousing
    - Warehousing
    - Inventory Management
    - Transfer History
- Manufacturing
    - Production Setup
    - Pre Production

  - Production Operations
  - Production Overview
  - Dashboard
- Fulfilment
  - Fulfilment
  - Fulfilment History
- HR and Training
  - User Management
- System Configuration
  - Tax Rules and Regulations
  - Company Information
- Document Hub
  - Document Hub
- ArcFlow Workflow and Module Dependancy
- High Level ArcFlow Workflow Overview
- The descriptions and diagram below illustrate the workflows that the system uses to support your daily manufacturing operations. Each workflow occurs within the listed modules, and once a workflow is completed within one module, it seamlessly transitions to the next module in the process.

- The description outlines the entire process, starting from loading products, assemblies, and items onto the system and creating their manufacturing routes. With these routes established, you can create sales orders and production orders, as well as initiate the ordering of necessary stock.

- After production orders are completed, the process outlines the steps from fulfillment to customer delivery, ensuring a smooth transition from production to final delivery.

- High Level ArcFlow Workflow Process

- Process 1: Blueprints and Routing

- You will begin by loading your items, assemblies, and products onto the system. After this, you will create the Bill of Materials (BOM) structures for these assemblies and products. Next, you can add stock values into your warehouse, which will integrate with the production and ordering processes.

- Once the BOM structures are in place, you can establish the manufacturing routes for the assemblies and products. With these routes created, you can then develop production plans for the assemblies and routes.

- Finally, after these steps are completed, you can add the sellable items, assemblies, and products to sales quotes and create sales orders.

- Process 2: Customers and Sales Orders

- You can quote customers and create sales orders for sellable items, assemblies, and products from your blueprints library. Once a customer accepts a quote, you can generate a sales order, which is then transferred to the production team via the manufacturing module to develop a production plan.

- Process 3: Production Orders

- You can now create production orders to fulfill your sales order. The system will calculate any stock shortfalls and notify the procurement department to create an order plan for the required raw materials. If sufficient stock or finished sellable items are available, the system will account for this accordingly.

- Process 4: Suppliers and Order Plans

- The procurement department will be notified of the production order and provided with a list of items needed to complete the production plan. You will then create a Request for Quote (RFQ) with multiple suppliers. Once a supplier's quote is accepted, a purchase order will be generated. You will track the receipt of the orders and generate a Goods Received Note to capture the received stock.

- Process 5: Warehousing

- Once a Goods Received Note has been created, you can assign the ordered items to various warehouse areas, such as raw materials.

- When the stock is available, you can initiate production plans and start allocating jobs, beginning with the kitting process.

- The warehouse also functions as temporary storage for completed sub-assemblies during their routing process, as well as a holding area for final goods awaiting customer delivery.

- Process 6: Work Orders, Job Cards, Kitting and Production Routes

- Work Orders are generated from production plans to schedule the start date, contents, and quantities of production.

- Subsequently, job cards are created to commence the production process based on the routing of assemblies and products established in the blueprints module.

- The first step in the routing of assemblies or products is to kit the necessary items for the assembly route or assemble the products for the final route.

- Job cards are associated with the processes involved in converting raw materials into assemblies and final products.

- These job cards are then allocated to employees responsible for carrying out and completing the processes at designated workstations along your production line.

- Upon completion of the final route, the products are stored in either the final goods storage or assembly storage in preparation for customer delivery.

- Process 7: Storage for Customer Delivery

- Once the products are completed, they are stored in their final goods storage unit. Upon availability, the fulfilment team is notified to commence the picking, packing, and scheduling of delivery to fulfil the sales order.

- Process 8: Order Fulfilment and Delivery

- The fulfillment team will proceed to generate a picking list containing the items required for delivery. Once the picking process is complete, you will package the contents and affix the appropriate labels.

- Following packaging, the goods will be temporarily stored in a designated area, ready for either customer pickup or collection by the courier supplier for delivery to the customer.

- You can track the delivery progress using waybills to ensure successful delivery.

- High Level ArcFlow Workflow Diagram and Module Dependancy

System Configuration Overview

System Configuration Module Description:

The "System Configuration" module encompasses essential functionalities tailored to set up and customize system parameters.

You are able to setup your company information which feeds into customer, supplier and GRN documentation for recording and accounting keeping.

Tax rules and regulations allow you to create different tax classes to be assigned to sellable items, assemblies and products. The tax class are assigned to these sellable types to different customers for different tax jurisdictions during the quoting and invoicing stages.

System Configuration Process Flow:

System Configuration Sub Modules:

- Tax Rules and Regulations

This component provides tools for configuring tax-related parameters, including tax rates, jurisdictions, exemptions, and compliance requirements. Users can define tax rules based on regional regulations, product categories, or customer attributes, ensuring accurate calculation and application of taxes across transactions. Additionally, this functionality supports updates to tax laws and regulations, helping businesses maintain compliance and mitigate risks.

- Company Information

This section allows users to input and maintain vital company details such as legal entity name, address, contact information, and organizational structure. It serves as the foundation for various ERP processes, ensuring accurate representation and identification of the company within the system.

Company Information

Overview Description:

The configuration for company information facilitates the input of essential company details, including Registered Name, Trading Name, Tax Number, Registration Number, Billing, and Shipping Address.

This entered information serves to automate the inclusion of company details on system-generated documents intended for customers, suppliers, or record-keeping purposes.

Overview Process Flow:

Overview Video:

Company_Info_Final.mp4

Walkthrough Documentation:

- Company Information

Step 1: Select the "Company Information" Sub Module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/cdd687e3-1af3-40c5-a849-7492c404ef8f/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=424,167

Step 2: Enter in your registered company name, trading name, registration number, VAT or Tax numbers, Email Address, Mobile Number and Company Base Currency.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a2e8e2b0-34f6-46a7-9ab6-430f005392c7/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=188,141

Step 3: Enter in the brief description of your company, website URL and upload your company logo.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ae2e3c00-a6f5-47fe-9410-d5adffe328a5/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=133,282

Step 4: Use the search functionality to enter in your companies Billing Address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/2f866fd4-4f8c-4d92-98e5-64a95f04923d/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120

.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=162,320

Step 5: Use the search functionality to enter in your companies Shipping Address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a61d5c17-d592-40ec-b458-585ef63e6b13/ascreenshot.jpeg?tl_px=0,1024&br_px=1719,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=400,317

Tax Rules & Regulations

Overview Description:

The configuration for tax rules and regulations enables the creation of multiple tax classes, each designated for sellable products, assemblies, and items. These tax classes are comprised of several components, including Tax Rate, Collection Jurisdiction, Destination Jurisdiction, and the effective start date.

Below are the definitions for each component:

Collection Jurisdiction

- Definition: The specific location from which the sales transaction originates, typically representing the seller's business premises or the point of dispatch for the goods.
- Determining Factor: The seller's business address or the site from which the products are shipped.

Destination Jurisdiction

- Definition: The location where the goods are ultimately delivered, typically corresponding to the buyer's location.
- Determining Factor: The delivery address or the buyer's business location where the goods are received.

Tax Rate

- The tax rate is the VAT or sales tax in which you charge the buyer.

Start Date

- Current Date: If you are setting up the tax class to be used immediately, you can use the current date.
- Future Date: If the tax class will apply from a specific future date (e.g., the start of a new fiscal period or in anticipation of a tax rate change), you should set that future date.
- Historical Date: If you are entering the tax class to reflect a period that has already begun (e.g., backdating to align with fiscal policies or corrections), you should use the relevant past date.

Overview Process Flow:

Overview Video:

Tax Class.mp4

Walkthrough Documentation:

- Create and Assign a Tax Class

Step 1: Select the "Tax Rules and Regulations" Sub Module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/67ff1381-9c96-4589-9d6d-71a09e9cd198/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=265,272

Step 2: You will view a global list of already created tax classes. To create a new tax class, you must select the "Create Button".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/088c3833-cbc9-4bfc-9909-d075f4fdb2f0/user_cropped_screenshot.jpeg?tl_px=12,0&br_px=3451,1813&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1022,66

Step 3: Enter the tax class name.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/131fec41-cd91-428a-a8d7-26b66a5080fb/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1806&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=288,161

Step 4: Select the collection jurisdiction by using the drop down list of pre defined countries.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ff608a36-5b8c-40c8-ab2c-66808fe607cb/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1802&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=337,196

Step 5: Select the destination jurisdiction drop down box to select the country from the pre defined list.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/5296b112-1119-4e65-ae0b-9394aa9d037c/user_cropped_screenshot.jpeg?tl_px=7,0&br_px=3447,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=595,197

Step 6: Enter the appropriate tax rate.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a5b45cb2-40ba-4fff-94a8-35f5efe15d38/ascreenshot.jpeg?tl_px=167,181&br_px=2460,1462&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 7: Use the calendar functionality to select the start date.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d2e652f9-3451-49a3-97f5-cb90eaee752b/ascreenshot.jpeg?tl_px=1294,353&br_px=3014,1314&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 8: A list of all of your sellable products will appear under the "Assign Class" table. You can select the appropriate products in which you wish to assign the tax class to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/3278ff5e-2813-44cf-bb79-8ed82fb89d10/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=49,429

Step 9: Once you have complete the fields above, you can select the "Create Tax Class" button. This will create the tax class and assign the class to the selected products.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4d1b4727-b25c-4a26-b779-f07f75312452/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=939,173

To view the created tax class, you can go back to the previous page.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/76a6ad97-c3ad-49df-8530-fb8855f84606/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=260,21

The newly created tax class will be populated in the table seen below.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/07b13c89-6f44-4847-b620-8848dc606d3c/user_cropped_screenshot.jpeg?tl_px=13,0&br_px=3453,1815&force_format=pn

g&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1052,-2

HR and Training Overview

HR and Training Module Description

The HR and Training Module facilitates the management of employee or contractor information and records within the system.

Users can add employees or contractors as access users, granting them specific permissions to perform tasks within the ERP system. Alternatively, individuals can be added as non-access users for record-keeping purposes.

In summary, this module serves as a comprehensive tool for managing personnel and resources, whether for maintaining records or assigning permissions within the ERP system.

HR and Training Module Process Flow

HR and Training Sub Modules

- User Management

The ArcFlow User Management Sub Module allows admin users to create users to be loaded onto the system with their allocated permissions.

You are able to create two types of users which are outlined below:

  - No Access User: User won’t need access to the platform.
  - Access User: User needs log in and access to the platform.

- Each type of user will have their own specified permissions and access to certain modules, sub modules and features when navigating and performing actions on the system.

User Management

Overview Description:

The ArcFlow User Management Sub Module allows admin users to create users to be loaded onto the system with their allocated permissions.

You are able to create two types of users which are outlined below:

Access User

Access Users require login credentials and access to the ERP platform. They have permissions assigned to them based on their role and responsibilities within the organization. These permissions dictate what actions they can perform within the system, such as viewing, creating, editing, or deleting data, based on the modules and features they need to access to fulfill their job duties.

No Access User

No Access Users do not require access or assigned roles and responsibilities within the ERP system. They are individuals involved in your business operations but do not need direct system access. While you can record, pay, and track these users and interact with them through the system, they do not need ERP access to carry out their daily tasks.

Each type of user will have their own specified permissions and access to certain modules, sub modules and features when navigating and performing actions on the system.

Overview Video:

User_Final.mp4

Walkthrough Steps:

- Creating an "Access User"

Step 1: Select "User Management"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/259bca43-8a3c-497a-9ba5-23e4bfb0054f/ascreenshot.jpeg?tl_px=0,23&br_px=2293,1304&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=262,277

Step 2: Select "Create User"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/085521ba-b8de-42db-8665-292fc27aedb9/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1005,55

Step 3: Select "Access User"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/809f8a29-5d6b-4b26-b0d4-0a82a47ce0e0/ascreenshot.jpeg?tl_px=945,369&br_px=3238,1650&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 4: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/f65170b7-996b-4314-aadc-50afcceac0ae/ascreenshot.jpeg?tl_px=825,704&br_px=3118,1986&force_format=png&width=1

120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,329

Step 5: Enter in the users general information. Note: the email address entered at this stage will be utilised to send the user an automated email with their temporary login details.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/f4184b6e-cb03-46c4-b619-1991b1558db6/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=191,196

Step 6: Select the "Roles & Responsibilities" tab to allocate the user their access permissions.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d40fd1b4-227c-4ddc-b1e0-80ffaec582c5/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=452,180

Step 7: Select the roles in which the user will adopt. You can select multiple roles.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/7251cdab-c000-4ef0-a110-840b67064c29/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=51,272

Once you have selected a role, the responsibilities and permission in which the user will have access to will correspond to the table on the right.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/0602af39-7bd5-4a21-a82a-a900ae2df6c3/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=51,328

Step 8: Select "Payment Information"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/7f1aaed2-fa1c-4040-9696-4ad6d6a29c47/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=413,106

Enter in the users payment information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/4827e591-e90e-4c5e-8931-ac6dcfae3625/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=249,157

- Creating a “No Access User”

Step 1: Select "User Management"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/c15d2670-609b-42a1-b299-a006931cc8e0/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=276,267

Step 2: Select "Create User"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a3fda672-7ab2-4c69-8cdd-61f2b3982183/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1007,58

Step 3: Select "No Access User"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/de70e895-61f2-4287-8c0f-e2b352c35b63/ascreenshot.jpeg?tl_px=1234,347&br_px=2954,1308&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 4: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/b4a66f7e-4065-4e7d-b562-1e33f6f55131/ascreenshot.jpeg?tl_px=1132,969&br_px=2852,1930&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 5: Complete the users general information and then select the payment information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/22231542-5719-45ca-81cb-276c42cc5d67/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=301,109

Step 6: Select "Create User"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/26cb3b66-b686-4514-a62f-37763efb4604/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=997,64

Blueprints Overview

Blueprints Module Description

This module is where the products, assemblies and items are managed. This encompasses their Bill of Materials (BOM), Routing and metadata.

The blueprints modules encompasses two sub modules being the blueprints library and the routing for associated products, assemblies and items.

The library is where the database of all items, assemblies and products are managed. This allows for users to go through and a host of information about each of the stored entities including their BOM, routing, metadata and explosions (list of every item in the entity).

The setup of the Blueprints library and routing processes allows for warehouse stock to be updated, sales processes to be established, procurement cycles and enables the production through manufactured routes.

BOM Process and Structure

A bill of materials (BOM) is a comprehensive list of all the components, parts, and raw materials required to produce a finished Assembly or Product. It includes detailed information about each item, such as the part number, description, quantity, and the relationship between the components. The BOM serves as a reference for production planning, inventory management, and cost estimation. It ensures that all the necessary materials are available and that the production process runs smoothly.

The BOM follows a structure as seen in the diagram below:

Routing Processes and Structure

Routing refers to the defined sequence of operations or steps that need to be followed during the manufacturing or production process of a product or assembly. It outlines the specific tasks, workstations, and resources required at each step to transform the raw materials or components into a finished product. This can also include any documentation or quality controls required during a part of the process.

The routes of a BOM can follow two distinct processes being manufacturing routes and sub contracted routes.

The high level overview of the assembly or product route is found below and elaborated further on the “Routing” training folder:

Blueprints Module Process Flow

Blueprints Sub Modules

- Library

The library is where the database of all items, assemblies and products are stored. This allows for staff to go through and a host of information about each of the stored entities including their BOM, routing, metadata and explosions (list of every item in the entity).

- Routing

Routing refers to the defined sequence of operations or steps that need to be followed during the manufacturing or production process of a product or assembly. It outlines the specific tasks, workstations, and resources required at each step to transform the raw materials or components into a finished product. This can also include any documentation or quality controls required during a part of the process.

Library

Library Overview Description:

The Blueprints module facilitates the digital creation of your manufacturing company's Items, Assemblies, and Products.

This module allows you to meticulously define and create isolated items, assemblies, and products, each with their key information and attributes. These attributes seamlessly integrate into and support various processes regarding ordering, sales, manufacturing, and storage of the created items, assemblies and products.

Additionally, the Blueprints module facilitates the creation of Bill of Materials (BOM) structures for assemblies and products. This step is crucial as it establishes the foundation for the manufacturing routes needed to produce the specified structures.

By leveraging the Blueprints module, you ensure a cohesive and efficient workflow from the initial creation of components to the final production stages.

Definitions and Key Attributes

Item

An item stands as the fundamental building block, situated at the lowest level of the BOM hierarchy within assemblies or products. These items encompass raw materials or any components incapable of further subdivision into smaller parts.

The key attributes and their definitions are found below:

- Is Shipping Container

If you tag an item as “Is Shipping Container” the system will store this items as a container for packaging completed sellable stock for customer delivery. These items will be presented in the fulfilment module when you need to allocate packaging materials for customer deliveries. An example of this type of item will be a wooden pallet.

- Is Shipping Supplies

If you tag an Item as “Is Shipping Supplies” the system will store the item for the purposes of protecting sellable stock inside the shipping container. An example of this type of item would be bubble wrap.

- Is Sub Contracted

If you tag an Item as “Is Sub Contacted” it means that you will not be able to directly procure this item. Rather, you will have to create a sub contracted route that has this item as a result.

- Supplier Conversion

When you load an item you allocate your internal Unit of Measure. When you are linking the supplier which will supply a particular item, you enter in the suppliers UOM. If there is a difference between the conversion of your UOM to the suppliers UOM, please enter the conversion of the single supplier UOM compared to your UOM of the item. You can enter in "1" if there is an exact conversion between you and your supplier.

Eg:

Your UOM: Box Supplier's UOM: Carton Conversion rate: 1 Carton = 10 Boxes If you need to order 50 Boxes of screws from your supplier, you'll first need to convert it to their unit of measure:

50 Boxes * (1 Carton / 10 Boxes) = 5 Cartons

So, you would need to order 5 Cartons of screws from your supplier to fulfill your requirement of 50 Boxes.

- Can Sell

If you tag an Item as “Can Sell” it means that you can directly add the item as an individual line item on a quote or invoice. These items will need to be stored in the finished goods warehouse area type.

Assembly

An assembly consists of multiple child items and additional sub-assemblies. These components are combined into a Bill of Materials (BOM) to create the assembly. Physically, assemblies are produced through a sequence of operations defined in their production route. An assembly can also be included in the BOM of a parent assembly or final product.

The key attributes and their definitions are found below:

- Is Sub Contracted

If you tag an assembly as “Is Sub Contracted” it suggests that, although there is a Bill of Material for producing it in-house, the entire assembly will be manufactured by an external company.

- Is Phantom

A Phantom Assembly refers to a a group of components used temporarily in the production process. It is not a physical assembly, rather a virtual grouping of items for manufacturing convenience, bypassing inventory tracking.

- Is Manufactured In-House

If an assembly is tagged “Is Manufactured In-House” it suggests the assembly is produced in-house by following its routing process and associated BOM.

- Is Packaging

The Assembly created is used for packing purposes and not directly linked to the BOM structure of a parent assembly or final product.

- Can Sell

If you tag an Assembly as “Can Sell” it means that you can directly add the Assembly as an individual line item on a quote or invoice. These Assemblies will need to be stored in the finished goods warehouse area type.

Product

A product is the highest level in a Bill of Materials (BOM) structure. It is a collection of items and assemblies, created through a BOM. Unlike assemblies or items, a product cannot be included as a child in another BOM structure. Physically, products are produced through a sequence of operations outlined in their routing process. Products are typically ordered by customers and manufactured specifically for sales.

The key attributes and their definitions are found below:

- Is Sub Contracted

If you tag a Product as “Is Sub Contracted” it suggests that, although there is a Bill of Material for producing it in-house, the entire Product will be manufactured by an external company.

- Is Packaging

The product and BOM is used for packaging purposes for the delivery of additional sellable products.

- Is Manufactured In-House

If a Product is tagged “Is Manufactured In-House” it suggests the Product is produced in-house by following its routing process and associated BOM.

- Can Sell

If you tag a Product as “Can Sell” it means that you can directly add the Product as an individual line item on a quote or invoice. These Products will need to be stored in the finished goods warehouse area type.

BOM Structure:

Enabling of External Workflows

Routing

Once you have completed your library and BOM structures, you can create manufacturing or subcontracting routes for items, assemblies, and products. The routes are made up of processes associated with the BOM.

Sales

Once you have completed your library, you are able to add the items, assemblies or products onto sales quotes and invoices. Additionally, sales orders will be created which will feed production processes.

Procurement

Once you have completed your library, you are able to request quotes from suppliers for the created items, assemblies and products which then convert to purchase orders and received ordered items will be assigned to the warehouses.

Warehouse Stock

The creation of the products, assemblies and items also allows you to add stock values into the warehouse for the created products, assemblies and items.

Production

Created items, assemblies and products and their associated BOM and routes feed into the production processes through the completion of processes based on its route.

Overview Video:

Blueprints-Library.mp4

Walkthrough Documentation:

- Create an Item

1\. Lets go through the process of creating an item.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7ef2ffe9-804f-4324-8ce1-d42a02003ac9/ascreenshot.jpeg?tl_px=1951,23&br_px=2811,504&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=734,212

2\. This is the text box where you enter your internal item code.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/fca43562-3fbc-4351-80da-72553f024fe7/ascreenshot.jpeg?tl_px=0,57&br_px=859,538&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=205,212

3\. The name is the internal name used for the item. This will also be used in the search functionality.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a1a4a56f-ca50-4c48-8105-1d093ab20af1/ascreenshot.jpeg?tl_px=1177,62&br_px=2037,543&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. We now enter the version number after ticking the track by version.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ae62ac4b-e0ad-43d7-9138-df6019e5c982/ascreenshot.jpeg?tl_px=0,0&br_px=1376,769&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,261

5\. You can now set the status for the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ad5af14f-b669-4266-a0e9-69670e4928d5/ascreenshot.jpeg?tl_px=1072,164&br_px=1932,645&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. If this version of the item has any revision those can be entered here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/cbe36475-71dd-4eae-bc74-3bb1246985f4/ascreenshot.jpeg?tl_px=52,25&br_px=1429,794&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

7\. Enter the unit of measurement for the item.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/dcc1a9a7-b38d-4944-8049-563c97525d76/ascreenshot.jpeg?tl_px=1170,287&br_px=2030,768&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

8\. We can classify this item to make it easier to find within this section of the library.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/674e6b17-d502-4530-831c-f9d25148aa03/ascreenshot.jpeg?tl_px=9,294&br_px=869,775&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. Click "Metal (e.g., steel, copper, aluminum)"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/6f71ee2e-8876-4f7c-9311-7b788cfc27cf/user_cropped_screenshot.jpeg?tl_px=1203,360&br_px=2063,841&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. If this item is used inside a shipping container (eg. bubblewrap) then this box can be checked.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5da4dd80-a5dd-4c6d-b621-6107f9a68df6/ascreenshot.jpeg?tl_px=1032,283&br_px=1892,764&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

11\. If the item is a shipping container (eg. a box) then this will need to be selected.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5fccaf82-1ad6-4c13-8f72-a4681a6968cc/ascreenshot.jpeg?tl_px=1034,312&br_px=1894,793&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

12\. We then move to the Supplier tab to add the relevant supplier information there.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0967f1a8-1f5e-4850-9d08-e2ada9e20600/ascreenshot.jpeg?tl_px=0,0&br_px=859,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=240,196

13\. We can select the suppliers who supply us with this item here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/eff7f06b-cbe8-45d7-9621-

23e1c14d7e36/ascreenshot.jpeg?tl_px=0,228&br_px=859,709&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=199,212

14\. We can then input the supplier part number for this item which will be used during procurement.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5c3732fd-5ee4-4f2f-9355-81f15b66be89/ascreenshot.jpeg?tl_px=98,251&br_px=958,732&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

15\. We can also add the supplier Minimum Order Quantity (MOQ) for this item from this supplier.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/be731ae8-56f2-435f-91d4-7227f93c4221/ascreenshot.jpeg?tl_px=249,254&br_px=1109,735&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

16\. We also indicate the suppliers Unit of Measure (UoM) to streamline procurement.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/1614cb90-131d-4fd7-8b0a-fb5f0c25bb62/ascreenshot.jpeg?tl_px=488,253&br_px=1348,734&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/580a44fa-93a3-40fe-8268-c1c12b0f3620/ascreenshot.jpeg?tl_px=449,439&br_px=1309,920&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

17\. We set how many of our internal units come from each of the suppliers UoM. Here we see that we get 6 units from each crate the supplier provides us.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5d81b276-e55f-4330-b80a-9cc228a6dbbf/ascreenshot.jpeg?tl_px=713,255&br_px=1573,736&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

19\. We also indicate what increments the supplier takes orders in. Some suppliers will require you to order in particular increments.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/24ace08c-fb6a-49d3-82e8-c841eabeb352/ascreenshot.jpeg?tl_px=954,252&br_px=1814,733&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

19\. Now we move to the Order & Sales tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/f667c498-677e-4bc7-91df-ff778c15608e/ascreenshot.jpeg?tl_px=0,0&br_px=859,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=393,201

20\. We now select if we want the system to track the manufacturing batch.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/1764f40d-a5b2-4043-8203-bbb43d95f83f/ascreenshot.jpeg?tl_px=0,109&br_px=859,590&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=103,212

21\. We also set if we want the system to track the manufacturing serial number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/8ae83f63-768e-463e-a693-554d360a5d4d/ascreenshot.jpeg?tl_px=0,148&br_px=859,629&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=105,212

22\. The minimum re-order quantity is minimum amount that can be ordered at one time. This avoids the situation where you only purchase one screw when you are one short instead of buying a bag.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/d59a3603-af99-4542-8aef-0a77f42195db/ascreenshot.jpeg?tl_px=0,204&br_px=859,685&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=392,212

23\. The minimum stock quantity is the stock level at which the a.i will begin to alert the user to procure more of said item.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/421c9267-6ae1-4e7c-a277-a4d5ec9510d1/ascreenshot.jpeg?tl_px=1162,190&br_px=2022,671&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

24\. The last paid unit price is used to create estimations for the cost during procurement. This will then change to the last paid unit price once the system is fully functioning.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0b6f63ce-ac0b-40d8-8b2b-253e0c29e0f1/ascreenshot.jpeg?tl_px=68,109&br_px=1444,878&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

25\. Average unit price is used if the user knows the average price paid but not the last paid unit price.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0cc262aa-060f-41a4-ab48-35665ce80f17/ascreenshot.jpeg?tl_px=1072,252&br_px=1932,733&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

26\. The ordering description can be used to add any extra information which may be necessary during the procurement phase such as special requests for the supplier.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a9eb5be8-eaac-4d4b-9791-c3dfb265740a/ascreenshot.jpeg?tl_px=76,298&br_px=1223,939&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

27\. If you mark this item as a sellable item- this means that the sales team will be able to sell it on to a customer even though it was not a manufactured product. You will then need to indicate how many you want in stock ready to be sold.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/9e362edd-0ad5-4a45-8ad4-9eb61a66f843/ascreenshot.jpeg?tl_px=0,575&br_px=859,1056&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=216,212

28\. Avg Monthly Sales is used by the system to estimate how many you will need in a given month and will alert procurement when it estimates you are running low.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5602a13b-98d1-4b7e-9d20-d4dc29e1faa3/ascreenshot.jpeg?tl_px=1050,505&br_px=2197,1146&force_format=png&width=

1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

29\. The unit price is the price at which the sales staff sell the item on to the customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/e837f02d-7b4f-4c73-a675-af83b1a19d00/ascreenshot.jpeg?tl_px=1109,681&br_px=1969,1162&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

30\. We can also add price breaks directly to this item. This will be visible for the sales staff.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0b538189-8901-47a9-9f76-8e22c43b1608/ascreenshot.jpeg?tl_px=0,724&br_px=859,1205&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=141,212

31\. Click this field.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/95b9b920-614e-4ada-8981-dd72ccd97246/ascreenshot.jpeg?tl_px=0,736&br_px=859,1217&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=145,212

32\. Here we can add the weight of the item which will be used during the shipping step to calculate shipping costs.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/1b6c53ce-b63c-458e-8b88-3a76658d63f8/ascreenshot.jpeg?tl_px=0,641&br_px=1719,1602&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=468,276

33\. The dimensions can also be entered for the shipping.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0f5659cd-bb36-4a3f-87a8-6cdd203a57d7/ascreenshot.jpeg?tl_px=1087,877&br_px=1947,1358&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

34\. The tax class for this item can be selected from the drop down.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/cb43d439-719d-4dfc-88ea-e71534d0fb41/ascreenshot.jpeg?tl_px=86,966&br_px=945,1447&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

35\. If you offer your customers a warranty on this item you can then assign this warranty type here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/30c37010-18ba-4fdc-8ef2-22737710d782/ascreenshot.jpeg?tl_px=1138,1122&br_px=1998,1603&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

36\. The 'Track by Batch" and "Track by Serial" buttons allow you to opt for this item to be tracked by your own internal batch or serial number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/94e778d3-19cd-4afd-a1c5-fa768ed0b26b/ascreenshot.jpeg?tl_px=0,1073&br_px=859,1554&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=101,212

37\. Lets move to the Manufacturer tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/126a3c94-205a-40e9-bb1b-9aea10210e3b/ascreenshot.jpeg?tl_px=92,0&br_px=951,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,200

38\. We can select the manufacturer from the drop down. By associating the manufacturer with the item we can then input its manufacturers part number which can be used during procurement.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/9ebac417-2411-4a47-95a2-ad7030880289/ascreenshot.jpeg?tl_px=0,180&br_px=859,661&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=197,212

39\. We input the Manufacturers Part number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/473f5fb8-0e36-4f30-9c06-d8b76d887350/ascreenshot.jpeg?tl_px=24,189&br_px=883,670&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

40\. We also indicate what type of carrier the manufacturer uses. An example of a carrier is resistors which are carried in a reel.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/041bb4af-d871-4647-a9f5-0794d80cca28/ascreenshot.jpeg?tl_px=664,297&br_px=1524,778&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

41\. We indicate the capacity of this carrier so that we know the max amount that can be ordered in each carrier.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/f0ca16f2-1a93-4c63-a4d4-0b8ee6d021f4/ascreenshot.jpeg?tl_px=1418,183&br_px=2278,664&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

42\. In the Documents section we can store any files which may be of relevance to the item. An example would be the design tolerances for a bolt or the info sheet for an electrical part.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a3345ff1-392d-4d4b-95cb-dc438080ff7b/ascreenshot.jpeg?tl_px=254,0&br_px=1114,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,205

Made with Scribe

- Edit and View an Item

Step 1: Select the "Library"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b1be3787-406e-4f6f-a4ce-5a0c78dd4dc4/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=280,274

Step 2: Select the "Items" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/ddbe6abb-c3d9-4689-b833-14a7b3b310ca/ascreenshot.jpeg?tl_px=0,53&br_px=2293,1334&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=404,277

Step 3: A global list of all previously created items will be listed. You can select the specific item in which you would like to edit or view.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/eacee71c-1e30-47c2-9b31-074b59d588f9/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=219,371

Step 4: You can now view and edit any previously created details of the item. First you can view the general information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0bb9604a-15c9-4a58-8c6d-69643cc2f401/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=145,130

If you select the suppliers tab, you can remove or add suppliers of the item and create new supplier conversions which will be utilised at procurement.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/bc97658f-700b-4858-ac73-6dd7579d1f85/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=328,207

The ordering and sales tab allows you to view and edit the information regarding ordering and selling of the item.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/36b447f8-860a-4d56-8847-d5c30b45dc17/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=458,202

You are able to link manufacturers to the item for quality control and tracking purposes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/94df4940-c7dc-4252-b263-005d2456d145/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=392,121

The associations tab will link all the direct parent assemblies or products in which the item has been linked to. You are able to de link the items here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b2221e3f-2cd1-4029-88b4-e50dab75251a/ascreenshot.jpeg?tl_px=453,0&br_px=2746,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,205

The document tab will display are uploaded documents.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7b5b36fd-851a-4f07-b236-730aba87ba7f/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=548,122

The KPI metric tab will display the Key Performance Indicators for each different supplier which suppliers the item. The KPI will allow you to assess which supplier is most suitable for the supply of the items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/ca02da93-3dcd-436d-8b2b-a93024e1b019/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=61,123

- Create an Assembly

1\. Start by entering in the internal code for the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/55ac85a1-5b97-46dc-affa-07e905206433/ascreenshot.jpeg?tl_px=0,55&br_px=859,536&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=207,212

2\. Add the name of the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/1421afc8-8726-4b91-8911-bd24d71afbe0/ascreenshot.jpeg?tl_px=1093,68&br_px=1953,549&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Input the version of this assembly you are currently building if you use version control.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/d458db94-5328-4729-a9c0-fc3e0cebdcfe/ascreenshot.jpeg?tl_px=106,117&br_px=966,598&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. If this version has a revision number it can then be added here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/783d7a52-09f5-446d-a49b-4bda229965fc/ascreenshot.jpeg?tl_px=55,38&br_px=1432,807&force_format=png&width=1120

.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

5\. We can set the status of this assembly as active or inactive.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a39f80e8-3bfb-4a27-b128-3a23f7021ebc/ascreenshot.jpeg?tl_px=1115,166&br_px=1975,647&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Set the unit of measure for this assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/8ebd6603-7e32-4de9-8326-ae61adc09bc9/ascreenshot.jpeg?tl_px=1100,294&br_px=1960,775&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. The assembly can be allocated to a category.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ed81f295-86a1-4d9b-a41b-ba6b943abd23/user_cropped_screenshot.jpeg?tl_px=95,0&br_px=1472,412&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=564,84

8\. A sub-category can also be assigned for added granularity.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a5878289-6dc8-410c-977d-183314acb2f0/ascreenshot.jpeg?tl_px=1159,401&br_px=2019,882&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. We now move on to the Bill of Materials (BOM) tab. Here we will construct the structure of the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7e8b458a-e73e-43bd-9562-4ab8c240b19a/ascreenshot.jpeg?tl_px=0,0&br_px=859,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=252,205

10\. Using the items drop down we can allocate any items which make up this assembly. As we select each item we will see it populate below the assembly

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/29998235-8c29-4cef-bd00-fb75ac7108c2/ascreenshot.jpeg?tl_px=0,105&br_px=859,586&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=174,212

11\. Im going to select a nut, washer and spacer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/b9ce3d41-4f64-4340-a399-4b21628e6382/ascreenshot.jpeg?tl_px=0,111&br_px=859,592&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=280,212

12\. You can then adjust the quantity of each line item using the numerical input boxes highlighted in orange. If you use a designator for the line item during manufacturing this can be allocated in the box highlighted in red.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/38bc6b8f-825c-42d0-bcad-8d483be379a7/user_cropped_screenshot.jpeg?tl_px=90,0&br_px=1810,727&force_format=png&width=1120.0

13\. You can also assign a sub-assembly to form part of this assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ec50904e-72cb-4b34-82f0-b940fc7dc377/ascreenshot.jpeg?tl_px=122,181&br_px=981,662&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

14\. Lets move onto the manufacturing tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/baafdfc9-aec3-4f0b-8c2a-cd1c871b708d/ascreenshot.jpeg?tl_px=0,0&br_px=859,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=398,203

15\. If we subcontract out this assemblies manufacturing process we select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ac734323-91b2-4512-92e7-afdae7383f0a/ascreenshot.jpeg?tl_px=0,110&br_px=859,591&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=99,212

16\. A phantom assembly simplifies manufacturing by combining multiple components into one virtual assembly. If this assembly is a phantom assembly then this option will need to be selected.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/70bc7310-3461-4ba6-ba6f-655144cd21b0/ascreenshot.jpeg?tl_px=0,138&br_px=859,619&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=103,212

17\. If this assembly is manufactured in house then select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0dee1d05-d9ed-47dc-a343-861a96dd421c/ascreenshot.jpeg?tl_px=1029,108&br_px=1889,589&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

18\. If the assembly is used for packaging then this option will need to be selected. An example of this would be the construction of a container assembly to be used to package other goods.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/e1d910f6-d3a6-41c8-ab2a-49db7af1ceb9/ascreenshot.jpeg?tl_px=1037,148&br_px=1897,629&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

19\. The Min. Manufacturable Batch is the smallest size batch that you can make.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/35bf8317-a672-49ef-ad85-b8dca63cdc40/ascreenshot.jpeg?tl_px=0,208&br_px=859,689&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=371,212

20\. The Max Manufacturing Batch is the largest size batch you are capable of making.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/854dfa11-3210-4626-aab7-a36de7719362/ascreenshot.jpeg?tl_px=1061,193&br_px=1921,674&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

21\. The average build duration is an initial estimate which the system uses temporarily until a build has been completed and it can track the true build duration.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/19dd5007-12af-47c3-a90b-

8327cea790a4/ascreenshot.jpeg?tl_px=166,246&br_px=1026,727&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

22\. If you want to track the assembly by a batch code you will need to select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/28f2927e-5c77-45fd-b250-885a1dead1f6/ascreenshot.jpeg?tl_px=0,355&br_px=859,836&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=100,212

23\. Once selected you will need to decide on the batch prefix convention for your batch system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/9779d35f-5a57-4266-9ccd-43ae159c5e32/ascreenshot.jpeg?tl_px=0,413&br_px=859,894&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=147,212

24\. If you are going to track using a serial number you will need to select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/58a0b4cb-2162-4edb-9712-8bdddbb404cc/ascreenshot.jpeg?tl_px=1025,353&br_px=1885,834&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

25\. Once selected you will need to decide on the serial prefix.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5274d1f3-70e5-4241-aef0-1dbfe8d3dc0c/ascreenshot.jpeg?tl_px=1088,417&br_px=1948,898&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

26\. You then need to move onto the ordering and selling tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/19d7974f-aa00-40e2-b3b1-530bc1714381/ascreenshot.jpeg?tl_px=102,0&br_px=961,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,196

27\. This field sets the minimum amount of this assembly you can should be able to make from your stock at any time. If the system sees you are running low on a raw material needed to manufacture this assembly it will alert procurement.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/db5ced41-1847-4acb-9eb6-ae9be130a4ae/ascreenshot.jpeg?tl_px=0,127&br_px=859,608&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=317,212

28\. The user needs to estimate the labour cost associated with building this assembly. The system will calcualte this value after a single build has run through the system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/c3e9b0e9-2d95-4459-a2b6-75d20fa6f138/ascreenshot.jpeg?tl_px=0,265&br_px=859,746&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=388,212

29\. The user needs to estimate the operations cost associated with the creation of the assembly. The system will calculate this value after a single build has run through the system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/f01573d3-d12b-42a7-837a-ca6aab1641ee/ascreenshot.jpeg?tl_px=4,329&br_px=864,810&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

30\. The estimated component cost for the Bill of Material can either be inout by the user or they can follow the step below to copy the component cost the system has calculated by using the item cost of each item an assembly inside the parent assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/560b4fc8-3886-49e4-968f-8203cd74ff13/ascreenshot.jpeg?tl_px=0,385&br_px=859,866&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=375,212

31\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/1a665262-96de-406a-b7bd-d3118c6cdc57/ascreenshot.jpeg?tl_px=1022,390&br_px=1882,871&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

32\. If this assembly can be sold without being part of a product we can indicate that here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/71453c6a-508e-4d56-bf91-161f899e8f0a/ascreenshot.jpeg?tl_px=0,520&br_px=859,1001&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=98,212

33\. If it is sellable we then need to indicate the minimum amount of assemblies to have in stock ready for sale.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/b6c15c47-fcff-45ba-99f2-016e9cfdb20d/ascreenshot.jpeg?tl_px=0,573&br_px=859,1054&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=360,212

34\. The user can input the estimated average monthly sales of this assembly so the system can begin to estimate the necessary procurement of its underlying stock items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/e63dc711-b7ec-4293-9732-76e8aaef3df7/ascreenshot.jpeg?tl_px=1082,576&br_px=1942,1057&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

35\. The weight of the assembly can be input here for consideration when shipping.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/94ecfa7e-20ad-4d93-8f5c-59c0fefdcbf0/ascreenshot.jpeg?tl_px=38,818&br_px=897,1299&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

36\. The dimensions of the assembly can also be added for shipping purposes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/dc4a0c33-36c0-4521-a5e4-5b3679807fa4/ascreenshot.jpeg?tl_px=1128,823&br_px=1988,1304&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

37\. This dropdown allows the user to assign a tax class to the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7a2745c8-0844-4f0f-bab4-3a0c2593e1ba/ascreenshot.jpeg?tl_px=80,1054&br_px=939,1535&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

38\. The assembly can also be assigned a warranty.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/697986b3-2732-423e-a256-fc299198717d/ascreenshot.jpeg?tl_px=1154,1062&br_px=2014,1543&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

39\. The documents section will allow any necessary documents to be amended to the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/bbd8efbe-a871-4366-87d9-3db2b1394a99/ascreenshot.jpeg?tl_px=259,0&br_px=1119,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,197

40\. The assembly can now be created.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/299de603-2866-499b-bf59-c4b2ce5c17d7/ascreenshot.jpeg?tl_px=1951,0&br_px=2811,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=681,120

- Edit and View an Assembly

Step 1: Select "Library"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4fd8c9ed-2150-4292-9271-f3e442fa0f9f/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=280,276

Step 2: Select the Assemblies tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/36cb9e3d-1cd4-493a-a0ae-44736f81382d/ascreenshot.jpeg?tl_px=0,211&br_px=1719,1172&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=374,277

Step 3: A global list of all previously created assemblies will be listed. You can select the specific assembly in which you want to view or edit.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/aa15b15c-65b5-48a1-8ca2-a80d71240a42/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=220,364

Step 4: You can work through each tab to view and edit the information. The general tab allows you to view and edit the assemblies basic information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/27a05184-ac6e-406f-8119-90c67b76aaff/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=256,175

The BOM tab allow you to view the assemblies BOM structure and add or remove further children to its structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/cb303801-4b30-4ad5-847b-1f35e0c905b1/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=252,106

The explosion tab lists all the individual child items and their associated quantities linked to the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/30d2a7b4-413f-4e7f-9536-ac5185d92e67/ascreenshot.jpeg?tl_px=11,0&br_px=2304,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,174

The manufacturing tab allows you to change the manufacturing attributes such as the assembly being sub contracted or manufactured in hour.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/e8799022-d559-47b4-8c0d-95ffa91be0f4/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=433,104

The ordering and selling tab allows you to edit and view the ordering quantities, costing based on component and labour costs. You are able to manually add the costs or over our time, the system will recommend the accurate costing. You are able to tag if the assembly is sellable or if it is just a child to another sellable parent product or assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b1cccc3d-45fb-4a35-b17f-c39d343c943f/ascreenshot.jpeg?tl_px=8,0&br_px=3448,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,107

The association tab will list all of the parent products, assemblies or child assembly or items in which the assembly is linked to through alternative BOM structures.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/ba3d5e8b-fb61-4adf-92a4-4e8b77084d9a/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=601,107

- Create a Product

1\. We start by entering in the internal Product code.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/eaf88391-cc1c-46d2-8550-06bff42280cc/ascreenshot.jpeg?tl_px=0,59&br_px=859,540&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=334,212

2\. The internal product name is entered here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/16ec9342-6863-48c2-bbef-d208f5e19eca/ascreenshot.jpeg?tl_px=1361,68&br_px=2221,549&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. If the product is tracked by version it can be selected and the version can be input.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0ac25c86-5602-4b14-b27c-5f6b313fb59f/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=1581,782&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=819,205

4\. If the product is tracked by its revision it can be selected and the revision number can be added.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/4bdd5019-d56a-40f7-a96e-93a13af74082/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=1577,862&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=709,267

5\. The unit of measure for the product is selected.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/afb8e11a-729e-49fb-9ed2-

0322d828f005/ascreenshot.jpeg?tl_px=1159,303&br_px=2019,784&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. The product is set to either an active or inactive status.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a8b8fd0b-12d4-4145-9693-6b8954f313f2/ascreenshot.jpeg?tl_px=1111,172&br_px=1971,653&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. The product can be classified to a category.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7140ce43-f205-4aa9-a52f-89d9f0acea4d/ascreenshot.jpeg?tl_px=12,90&br_px=1731,1051&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

8\. It can be further classified using the sub-category.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/35540a5f-425c-4ebd-9c83-1e13e6b6d1ee/ascreenshot.jpeg?tl_px=1140,368&br_px=2000,849&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. We can now build the Bill of Material for this product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a97f469c-5036-4a02-a3bd-a84ec21782e0/ascreenshot.jpeg?tl_px=0,0&br_px=859,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=249,206

10\. Using the drop down we can select all the items which form part of this product. These are selected using the tick boxes and their quantities can be altered when they are inside the product structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/e42760e3-c91c-4498-bb4c-cdaa80029fe7/ascreenshot.jpeg?tl_px=0,268&br_px=859,749&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=121,212

11\. Using this dropdown we can select all the sub-assemblies which form part of this product. These are selected using the tick boxes and their quantities can be altered when they are inside the product structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/67baeecd-4d23-491b-896b-5c9389ac7ed3/ascreenshot.jpeg?tl_px=0,225&br_px=859,706&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=361,212

12\. Here we can see an example of a product which has been alloacted 2 assemblies and 3 items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/b8194659-6151-41f2-8619-e26f91aabaec/ascreenshot.jpeg?tl_px=0,144&br_px=1376,913&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=92,277

13\. The quantities of a selected item or assembly can be altered inside the product structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/d82fc067-dd1a-4638-a7ba-9dc5754cba24/user_cropped_screenshot.jpeg?tl_px=139,0&br_px=1859,813&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=901,223

14\. If we are satisfied with the BOM structure we can move onto the manufacturing settings.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/170091be-0468-4905-bdd2-0eca61e38188/ascreenshot.jpeg?tl_px=0,0&br_px=859,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=365,190

15\. If the product is sub-contracted out for full or partial assembly you will select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/4484635f-fe9a-4b98-9587-384e871e7aa5/ascreenshot.jpeg?tl_px=0,112&br_px=859,593&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=99,212

16\. A phantom product simplifies manufacturing by combining multiple components into one virtual product. If that is the case then select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7933869e-4e19-4309-8449-061d4444762e/ascreenshot.jpeg?tl_px=0,145&br_px=859,626&force_format=png&width=860&

wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=101,212

17\. If this product is manufactured in house then select this option.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/178e66eb-2653-46b5-b839-50855994f0a0/ascreenshot.jpeg?tl_px=1037,110&br_px=1897,591&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

18\. Select this if the product is going to be used as a packaging material then select

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/90c60ceb-07d6-462c-bccf-5dc5dfaae119/ascreenshot.jpeg?tl_px=1030,148&br_px=1890,629&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

19\. The Minimum Manufacturable Batch is the smallest batch size you can manufacture.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/20ec776d-639a-4cab-947b-9a7316b04e7b/ascreenshot.jpeg?tl_px=0,199&br_px=859,680&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=220,212

20\. The Maximum Manufacturable Batch is the smallest batch size you can manufacture.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/80946b18-349c-4e11-a8b6-960db4c73367/ascreenshot.jpeg?tl_px=1170,194&br_px=2030,675&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

21\. The User Average Build Duration is an estimate of how long it would take to build this product. Once the system has tracked the product through its manufacturing process it will calcualte this.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/f73856fa-033d-4c68-b50f-7acd2101d7e7/user_cropped_screenshot.jpeg?tl_px=78,0&br_px=1454,546&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=719,246

22\. Selecting this option will allow the system to track this product using a batch number system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/04d9e3b2-1a47-43ee-bde3-abb850e0a59a/ascreenshot.jpeg?tl_px=0,355&br_px=859,836&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=104,212

23\. You will need to set the batch prefix.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/9f0beff5-4b91-475a-b95c-5ba375579dda/ascreenshot.jpeg?tl_px=0,404&br_px=859,885&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=152,212

24\. Selecting this option will allow the system to track this product using a serial number system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/9aee86ca-4db3-4508-8d78-1c880c175807/ascreenshot.jpeg?tl_px=1037,352&br_px=1897,833&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

25\. You will need to set the serial prefix.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/4387f305-92fd-499e-8766-a51dd4075726/ascreenshot.jpeg?tl_px=1057,408&br_px=1917,889&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

26\. Lets move onto the Ordering & Selling tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a12b6320-4111-4154-ba46-e3dcfdb6dd46/ascreenshot.jpeg?tl_px=77,0&br_px=936,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,198

27\. The Minimum Production Capacity from Raw Material Stock sets the minimum amount of this product you should be able to manufacture from the current stock levels of its items and assemblies. The system will use this number to ensure there is always a suitable amount of components to make up this product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/879e755a-d23e-4e7e-aed4-2da6215e7e9a/ascreenshot.jpeg?tl_px=0,136&br_px=859,617&force_format=png&width=860&

wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=315,212

28\. Here you enter the dimensions of the product for shipping consideration.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/4a0e5636-e67b-4aef-885e-d411e1aa7d8a/ascreenshot.jpeg?tl_px=1068,121&br_px=1928,602&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

29\. In the costing section the user will need to provide estimates of the labour and operations cost so the system has an initial value to use for its cost estimates. Once the system has run through the manufacture of this product it will then calcualte accurate costing.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/2337b11d-5d35-4898-906e-e1ace9fa9a86/ascreenshot.jpeg?tl_px=66,194&br_px=1213,835&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

30\. The user will need to provide a Bill of Materials cost. This can either be an estimate or it can just be copied from the material costs calculated by the system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ac9c88c0-c8f4-42de-94ea-532cc21e84e6/ascreenshot.jpeg?tl_px=65,388&br_px=925,869&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

31\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/eb0d9171-c82a-4f82-b542-fed1d3d7f173/ascreenshot.jpeg?tl_px=1008,388&br_px=1868,869&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

32\. If the 'Can Sell' button is clicked this product will be available to be sold to your customers.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/1bb23a6a-4afc-455c-a43d-45abb460aedb/ascreenshot.jpeg?tl_px=0,521&br_px=859,1002&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=103,212

33\. The Minimum Finished Goods Quantity in Stock tells the system how many of the product you should have available at anytime and will action manufacturing if the stock level is below the set amount.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/635e1cc5-eace-4b7a-a244-9c48ba15852a/ascreenshot.jpeg?tl_px=0,575&br_px=859,1056&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=219,212

34\. The Average Monthly Sales is an estimate provided by the user so the system can begin to forecast demand for this product. This is before it has begun collecting data from real sales through the ERP.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/05399679-7750-470d-ad48-63b4732169bb/ascreenshot.jpeg?tl_px=1315,579&br_px=2175,1060&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

35\. Click this text field.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5b32d007-727a-4ff3-b943-d19a402df9ec/ascreenshot.jpeg?tl_px=4,819&br_px=863,1300&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

36\. The dimensions for the finished product are input here for shipping calculations.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/152fb428-f2f0-4328-9e6b-d28e7b8d1952/ascreenshot.jpeg?tl_px=1106,809&br_px=1966,1290&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

37\. The product can be assigned a tax class here from the drop down.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/15ff37c7-7578-43db-948a-3b2d3adc90b3/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=1559,769&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=790,268

38\. The product can also be assigned a warranty from this dropdown.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0106bd50-b8f5-4949-9da6-

2a90023f3a5a/ascreenshot.jpeg?tl_px=1117,1101&br_px=1977,1582&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

39\. The documents tab allows the user to upload any relevant documents for the product. This could be any document from a data sheet to a manual for the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/fd1c14b9-1a7e-4d39-aefb-163d6ab8d98d/ascreenshot.jpeg?tl_px=256,0&br_px=1116,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,197

40\. The product is the created.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/3e4e42f9-6872-42ef-a9c2-1707a60f4cdb/ascreenshot.jpeg?tl_px=1951,0&br_px=2811,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=719,121

- Edit and View a Product

Step 1: Select "Library"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/e6191fa7-f344-4222-ad95-99336ddc3c82/ascreenshot.jpeg?tl_px=0,1&br_px=2293,1282&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=292,277

Step 2: Select the Products tab. A global list of all previously created assemblies will be listed. You can select the specific assembly in which you want to view or edit.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/e34302fc-5a4d-4f49-8bee-c531fda7f5b6/ascreenshot.jpeg?tl_px=0,529&br_px=1719,1490&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=443,276

Step 3: You can work through each tab to view and edit the information. The general tab allows you to view and edit the products basic information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/2c090e4c-504a-40de-8e6d-835a48abf4d8/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=266,200

The BOM tab allow you to view the products BOM structure and add or remove further children to its structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/a4b77326-143b-4507-a65f-4c3e4f4ce8d5/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=380,201

The explosion tab lists all the individual child items and their associated quantities linked to the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/2ba5a971-3845-447a-a752-f003dc11f6d0/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=516,198

The manufacturing tab allows you to change the manufacturing attributes such as the assembly being sub contracted or manufactured in house.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/19fe704a-cf69-48d2-b4cd-2f6605747d9c/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=426,119

The ordering and selling tab allows you to edit and view the ordering quantities, costing based on component and labour costs. You are able to manually add the costs or over our time, the system will recommend the accurate costing. You are able to tag if the product is sellable.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/c3b567f3-973a-48ff-b260-d4430ea0472c/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=531,119

The association tab will list all of the linked child assemblies and items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3fb5bc39-6662-4b5f-a10a-668757fdc7c4/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=591,119

- Creating a Bill of Materials

Step 1: Select the specific product or assembly you wish to build the BOM structure for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/825e2ea2-310a-4917-8ce3-9b9dc5c3e76a/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1816&force_format=png

&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=105,360

Step 2: Select the "BOM" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/7dd84727-e02e-4b2f-8a8a-79c79d70c86a/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=218,175

Step 3: You can see that the "Inverter" product currently does not have a BOM structure. You can start off with linking or adding children assembly on the immediate level underneath the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/40c94335-ebf3-4d95-b6c6-794858dedfbd/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1805&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=332,155

Step 4: You can select the multiple assemblies which will form part of the BOM structure. It is important to note that you are adding the immediate assembly child to the product. The assemblies might have their own assembly and item children, but when creating the BOM structure, you are adding the immediate children.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/04926bdc-7f93-496c-b9c6-4a59ac011f10/ascreenshot.jpeg?tl_px=0,369&br_px=1719,1330&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=471,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/ee3d65fc-8777-405c-a690-473f062e278a/ascreenshot.jpeg?tl_px=0,457&br_px=1719,1418&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=473,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/efad5be9-66c3-4428-9839-5da2df8ea4fa/ascreenshot.jpeg?tl_px=664,231&br_px=2384,1192&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

The children assemblies have now been added to the product. You can expand the assemblies BOM structure to view the full BOM structure of the product being created.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/56e54fa6-5353-4d65-b087-929cbc39385a/ascreenshot.jpeg?tl_px=0,239&br_px=2293,1520&force_format=png&width=11

20.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=122,277

As you can see, the assembly has its own linked item children. You can not edit the assemblies BOM structure here, rather you need to go find the specific assembly in the library and then edit its own BOM structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/8fce90c5-b2b5-416d-a90f-529f9e68d80a/ascreenshot.jpeg?tl_px=0,239&br_px=2293,1520&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=122,277

Step 5: You can select the "Add Items" dropdown list which will add selected items as children directly under the created product. You will not be linking the items to the listed assemblies, but rather directly linked to the product BOM structure.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/9bc9abb4-c706-463a-a162-6cd779e9ee95/ascreenshot.jpeg?tl_px=0,119&br_px=1719,1080&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=382,277

You can select multiple items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/9d2fce88-b91f-4add-a0d5-4861dd0662c4/ascreenshot.jpeg?tl_px=0,369&br_px=1719,1330&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=156,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/b7ead216-d5ab-4b69-856c-7291102c5ef8/ascreenshot.jpeg?tl_px=0,461&br_px=1719,1422&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=156,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/c2ab8e14-c533-4525-b6fb-9fe52cf7c763/ascreenshot.jpeg?tl_px=0,557&br_px=1719,1518&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=154,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/1548934f-f020-41bd-920f-1f145d984ca6/ascreenshot.jpeg?tl_px=0,57&br_px=2293,1338&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=516,277

You have now added all of the children assemblies and items to make up the BOM structure of the product. You are able to edit the quantities of the immediate children added, but not the

BOM structure of the linked assemblies. You can expand the children assembly to view the fleshed out product BOM structure with multiple levels.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/ec273834-eb62-4918-9124-aa0262ca4f30/ascreenshot.jpeg?tl_px=0,239&br_px=2293,1520&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=122,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/a3a6b26e-8671-45da-b196-a4dff68731f3/ascreenshot.jpeg?tl_px=0,239&br_px=2293,1520&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=122,277

Step 7: You can now edit the quantities of each immediate child assembly or items which make up the BOM structure of the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/e8739ff1-d565-406d-a264-94d8c082ced6/user_cropped_screenshot.jpeg?tl_px=13,0&br_px=3453,1811&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=606,226

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/eeef7f60-d233-4d06-9c7d-9f2ef3ebb244/ascreenshot.jpeg?tl_px=847,351&br_px=3140,1632&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/816d109b-5309-42f6-9819-701291edc2bf/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=751,238

Step 8: Upon completion, you will select the "Save Changes" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/03df6b14-745b-460e-b108-03cf75bf0aae/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=751,253

The product BOM structure has now been completed.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-09/864285c5-4e4b-4df0-ac2c-258a0467af8b/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1813&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1046,-5

Routing

Overview Description:

The ArcFlow routing functionality is essential for planning and sequencing the operations needed to transform raw materials or components into finished assemblies and products.

These established routes integrate with your internal production processes to create and schedule job cards for completing the associated tasks. Additionally, subcontracted routes can be set up to outsource the manufacturing of items, assemblies, or products.

This routing forms the foundation of production scheduling, planning, and capacity management.

The ArcFlow system allows you to create routing for the following processes:

Manufactured Assembly Routes

Manufactured Assembly Routes consist of a series of operations carried out through your internal manufacturing processes to produce an assembly. These routes utilize the Bill of Materials (BOM) structure, which comprise of children items and assemblies, and involve various processes performed by your employees at designated workstations.

Prerequisites:

- The Assembly needs to be tagged with “Is Manufactured In-House”
- The Assembly needs a BOM Structure
- If there are children Assemblies part of the BOM structure, they needs to have an already established route.

Manufactured Product Routes

Manufactured Product Routes consist of a series of operations carried out through your internal manufacturing processes to produce a Product. These routes utilize the Bill of Materials (BOM) structure, which comprise of children items and assemblies, and involve various processes performed by your employees at designated workstations.

Prerequisites:

- The Product needs to be tagged with “Is Manufactured In-House”
- The Product needs a BOM Structure
- If there are children Assemblies part of the BOM structure, they needs to have an already established route.

Sub Contracted Routes

Subcontracted routes can be created for items, assemblies, and products that are not processed in-house. For items, subcontracted routes are necessary when direct procurement is not possible, requiring the item to be obtained through an external manufacturing process. For assemblies and products, even though there is a Bill of Materials for in-house production, subcontracted routes mean the entire assembly or product will be manufactured by an external company.

Prerequisites:

- The item, assembly or product needs to be tagged with “Is Sub Contracted”
- You need to have created Sub Contractor services suppliers in the procurement module

Assembly and Product Manufactured Route Definitions

Each routing process comprises the following key workflows:

- Input: This encompasses the items or assemblies required for the process, which can either be the output from the preceding completed process or externally sourced materials.
- Process: This stage entails the specific operations, instructions, and tools necessary to execute the task or process outlined in the input stage.
- Output: The output represents the end results of the processed input, which subsequently form the final output of the process and are transferred to the subsequent process as inputs.

The routing process is intricately linked to the assembly or product Bill of Materials (BOM). Moreover, each step within the routing process is associated with a designated workstation and assigned employees responsible for its execution.

The final step of the routing process of an assembly or product is linked to a warehouse type storing the partial or final form of the completed assembly or product.

Functioning as a comprehensive roadmap for the entire production process, the routing ensures seamless guidance for every work order, operation, and assembly step, thereby facilitating the timely and efficient completion of the final product.

Additionally, the routing serves as the cornerstone for capacity planning activities once job cards have been assigned, aiding in the optimization of production resources and schedules.

Sub Contracted Route Definitions

The sub contracted routes comprises of utilising a sub contractor, which was created in the procurement module, to outsource the manufacturing processes.

Each route comprises of the following key terms:

- Sub Contractor: A type of servicing suppliers which receives your sent items, assemblies or products and completes their own internal route prior to convert the received stock into a finished state.
- Sent to Sub Contractor: The items, assemblies or products sent to the sub contractor to be converted into its finished state.

- Instructions: A set of document instructions which outline the request of work performance and details to convert the received items, assemblies or products into its finished state.
- Received from Sub Contractor: The outsourced manufactured items, assemblies or products which have been processed through your set of instructions into the finished state.

Since the route is sub contracted, you will utilise the procurement module to generate a RFQ and Purchase Order prior to the route being established. Once the route has been completed, you will receive the item, assembly or product in its finished state and allocate them to the correct warehouse.

Assembly Manufactured Routing

Product Manufactured Routing

Combined Manufactured Route

Sub Contracted Routes

Overview Video:

Routing.mp4

Walkthrough Documentation:

- Create Manufacturing Assembly Route

Step 1: Select the "Routing" Sub Module

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/cba7f9c6-1216-4fc0-b237-9c88e21aa4c5/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=415,175

Step 2: Select the assembly in which you want to create a route for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/302469d0-19e8-4f1b-8a9e-509427499bdf/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=245,386

Step 3: You will now create the processes involved in the route. Select the "Create Process" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f448a28f-0963-4b55-ba2f-7fc81cdc8315/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=843,124

Enter the process name

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/de8cc48b-52de-4702-ad3a-6b0a70570aad/ascreenshot.jpeg?tl_px=263,375&br_px=2556,1656&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Select the workstation in which the process happens at.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/20a51766-88ea-410b-8d23-84968d88a270/ascreenshot.jpeg?tl_px=991,497&br_px=3284,1778&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9a7bfcad-acd4-4ac9-a677-b120bfaf4fcd/ascreenshot.jpeg?tl_px=423,704&br_px=2716,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,394

Select "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/1718dcf5-1b3c-44bf-b372-ce0a7573e634/ascreenshot.jpeg?tl_px=721,609&br_px=3014,1890&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

The first process will now be added to the process flow drawing tool. You can now add the remaining processes involved in the route by repeating the processes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f1514354-4d11-4375-bc86-4d322fbfb9bb/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=850,122

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/d91aba2f-318e-4aa4-9b4e-bef5f8c9486c/ascreenshot.jpeg?tl_px=1736,3&br_px=3456,964&force_format=png&width=112

0.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=624,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/d3693527-e3e8-43a3-90cf-b54c5876f2d8/ascreenshot.jpeg?tl_px=532,541&br_px=2252,1502&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/23abfbe3-0ea9-4de8-b5d3-0fa53a60f764/ascreenshot.jpeg?tl_px=225,481&br_px=2518,1762&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/c434bcb4-4a1f-4f70-b99b-91d83064e5e4/ascreenshot.jpeg?tl_px=606,997&br_px=2326,1958&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9552c601-67f1-434a-b5cf-b2c79d9d92db/ascreenshot.jpeg?tl_px=713,601&br_px=3006,1882&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 4: You now need to add the warehouse in which the assembly will be stored upon completing its route. Since it is an assembly, you must select the Assembly Storage Area Type.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e0b0c0fc-ebb2-4c35-9a88-9be1d5f5557a/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=828,273

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/ace5c27e-17b6-44f2-980f-ebdd2001f897/ascreenshot.jpeg?tl_px=555,263&br_px=2848,1544&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/11576c8b-73e6-49b3-9778-876e1422b096/ascreenshot.jpeg?tl_px=555,263&br_px=2848,1544&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/296972da-5d40-475f-9ece-1bfba8df7e3c/ascreenshot.jpeg?tl_px=481,467&br_px=2774,1748&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/28a10bdb-897f-4042-938d-fea03345728b/ascreenshot.jpeg?tl_px=719,701&br_px=3012,1982&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: You can use the connector feature by selecting the starter node and dragging your cursor to connect it to the correct process sequence.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/a2f0d154-2599-4edd-9296-e32b26572ea8/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=179,358

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/69939304-958d-421a-baef-3c8178af8d7f/ascreenshot.jpeg?tl_px=560,801&br_px=2280,1762&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/7758941d-a1a1-4163-85a2-07fecfd799ee/ascreenshot.jpeg?tl_px=1174,805&br_px=2894,1766&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/a4f27077-bf88-4215-b805-4372f09ad9dc/ascreenshot.jpeg?tl_px=1736,801&br_px=3456,1762&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=533,277

Step 6: You now have established the process flow. You need to select "Process Details" to enter in the individual process inputs, process and outputs. These are the workflows which happen at each process prior to moving onto the next process in the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e3e0dc84-7089-4bb1-9665-0b386f16e4c1/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=223,61

Step 7: Since this process is to assembly the entire assembly, you can add the entire BOM.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/2ce52f69-6138-4a49-92b6-f50ac1f235c8/ascreenshot.jpeg?tl_px=16,30&br_px=3456,1953&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=785,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f757ec3f-1eaa-4651-976c-dfe227933da6/ascreenshot.jpeg?tl_px=775,559&br_px=3068,1840&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

The inputs for this process is the entire BOM structure of the assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/7648ef49-d6c3-4d14-93de-27401d1ed97f/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=755,290

You now need to add the process, which is the work activity to convert the inputs into the desired output for this process part of the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/b7e43aae-04fe-417e-b88d-5cf9cc25694c/ascreenshot.jpeg?tl_px=1162,657&br_px=3456,1938&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=597,276

You now need to select the output, in this example the output is the actual assembled assembly. The output will act as the input into the next process in the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/fdec3683-132e-447d-82fb-4ca162ea0c84/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=974,390

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/4ea571b4-5bbb-4a98-91df-4573bf4edf51/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=680,410

You can enter in the state in which the process ends.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/94a60e64-e3d2-412a-91df-6f380681fc28/ascreenshot.jpeg?tl_px=1162,704&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,523

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/4811ad7f-7d34-4382-855e-5ae3193f1d91/ascreenshot.jpeg?tl_px=1450,1024&br_px=3170,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,501

Select the Output destination, which is the next process in the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e9d0ac32-de09-448e-805d-c7827ea31158/ascreenshot.jpeg?tl_px=1162,704&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=766,526

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e10b0a7f-7ff5-4676-8f81-7fb97b6fed84/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=660,504

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/6d175db8-5f6f-458a-abca-03a7422f6474/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=660,444

Step 8: Select the next tab, which is the next process in the route and complete the inputs, process and output which occur at this process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/70f66f7e-cf04-48ae-8c5a-982e2656d803/ascreenshot.jpeg?tl_px=0,51&br_px=2293,1332&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=391,277

Since this process is testing, the output will be the same assembly, but the state will be that the assembly has been tested.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/0f76ca41-1560-42b7-84d1-99c209d5d22c/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=986,385

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/665614e4-7df0-4586-a2a7-7b647647b1ed/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=706,483

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/069df845-ae66-4d57-b186-57de5515c840/ascreenshot.jpeg?tl_px=1448,1024&br_px=3168,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,500

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/16c763c5-18d0-42f8-bd2c-f692dfbd7d26/ascreenshot.jpeg?tl_px=1448,1024&br_px=3168,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,500

Select the output destination, which is the next process in the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/853d1bf5-510b-498d-8da5-335e5db09c00/ascreenshot.jpeg?tl_px=1162,704&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=776,518

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/a159565c-1d66-4bb7-9a24-c66257aa3e91/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=681,446

Select the next step in the process, which is the Quality Control step.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/fa0f33bd-019e-4148-bdaa-f3bc351892d5/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=386,190

Select the output.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/04303858-a540-41d2-a48a-c91271b961bf/ascreenshot.jpeg?tl_px=1162,704&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=920,291

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9619d661-9d97-432f-91b8-62b811b628b6/ascreenshot.jpeg?tl_px=1162,704&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=821,479

Enter in the state.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9717af2e-9604-4c3f-b08a-655857d8cbb5/ascreenshot.jpeg?tl_px=1162,704&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=525,522

Select the output destination, which is the sub assembly storage unit since the route has been completed.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/41ca2c7d-c8e5-4a89-abef-0fedcebab863/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=656,510

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/adc2c59f-bd1f-4138-84eb-7f4e6d78f748/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=685,441

- Create Manufacturing Product Route

The following product route has been created to follow a two step process. The first step is to assemble the product and then the second step is to quality control the product. The product is then placed in the finished good store.

During the walkthrough you will note the input, process and output needed at each stage of the process within the route.

Step 1: Select the "Routing" Sub Module

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a68eb85b-e07f-4e94-bd16-6705accd07c5/ascreenshot.jpeg?tl_px=233,0&br_px=2526,1281&force_format=png&width=11

20.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,267

Step 2: Select a product which you will aim to create a route for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/f9c7306f-f0da-4268-8b30-654742a31111/user_cropped_screenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=119,277

Step 3: You will now use our visual process flow builder by select the "Create Process" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/207ef738-a375-48cb-8ec8-0a051f3e18d3/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=873,121

Step 4: Type in the process name and link the process to the associated workstation where the process will be performed.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/c3a8cdfa-e949-4d4f-ab75-8e898c71ef23/ascreenshot.jpeg?tl_px=319,417&br_px=2612,1698&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

The drop down list will provide you with a list of possible workstations.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/7003a2f7-575d-4dca-a220-07d34f708d9d/ascreenshot.jpeg?tl_px=594,649&br_px=2314,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a93f7d70-d68c-4223-ba8f-5de00ad81105/ascreenshot.jpeg?tl_px=630,1001&br_px=2350,1962&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: Select the "Create" button to add the newly created process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ee7046c7-d204-46ae-9c33-8df3abf77bf5/ascreenshot.jpeg?tl_px=962,767&br_px=2682,1728&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 6: Repeat the process outlined in step 5 to create a new process which will be linked to the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a79a956f-7010-42eb-a1d6-eed0532a008c/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=869,123

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/0f4476aa-f157-4a96-bf04-050062be8ec9/ascreenshot.jpeg?tl_px=778,551&br_px=2498,1512&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a784c954-dad4-410b-a4cc-e3ffbd488b54/ascreenshot.jpeg?tl_px=766,649&br_px=2486,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/46bc314c-a6dd-41f7-8ceb-9bb753ee18c5/ascreenshot.jpeg?tl_px=718,967&br_px=2438,1928&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/889076aa-3ad9-4df4-b778-cd1ea2d5c50b/ascreenshot.jpeg?tl_px=990,761&br_px=2710,1722&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 7: Place you cursor to the edge of the start block to initiate the route. You will drag the cursor to the next connecting process in the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/b19722c1-cce8-4224-b29f-697a9a1697aa/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=180,359

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/cf7f290e-8028-4ec5-b8c4-976b4987a2cf/ascreenshot.jpeg?tl_px=618,771&br_px=2338,1732&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 8: Every product route needs to be completed through the placement of the product to the associated warehouse. Since it is a product, we will add a "Finished Goods" warehouse as the final destination.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/3358fc3a-30df-42b4-bcc7-d6156e86a60e/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=968,120

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d90f85b8-2a4e-4ac6-9f8b-f4e438f06853/ascreenshot.jpeg?tl_px=882,439&br_px=2602,1400&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/497df451-5d82-4a29-b167-a6be4bbd67b3/ascreenshot.jpeg?tl_px=882,439&br_px=2602,1400&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/84d69f44-e2f2-470e-8090-7ea0aa16d7b3/ascreenshot.jpeg?tl_px=838,511&br_px=2558,1472&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/0922a994-931e-4d3d-8117-a7526ddc19e4/ascreenshot.jpeg?tl_px=1028,847&br_px=2748,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 9: You will now connect the final process to the associated warehouse.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d317ac60-be8d-4fd6-b782-fa60ad985d14/ascreenshot.jpeg?tl_px=1051,597&br_px=3344,1878&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 10: You have now created the process flow and high level processes which form part of the route. You will need to define the Input, Process and Output which will occur at each newly created process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/43159395-5dd9-4c8b-a1daab4c3ac540f0/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=234,59

Step 11: Since we created the first process to assemble the product, we need to define the input or what is received at this process. We will add the entire BOM structure as it is needed to assemble.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/6ed8e93c-ca62-40ea-8684-c862f6ea724e/ascreenshot.jpeg?tl_px=16,32&br_px=3456,1955&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=791,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/e8f7ad14-875f-4c36-a77e-17544d2aab8e/ascreenshot.jpeg?tl_px=833,559&br_px=3126,1840&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 12: We now need to define the process. The process is the action that happens to the input to transform it to an output. You are able to add tools, templates and instructions.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/58f11dfe-2368-4b73-a6b3-962d8bc209a7/ascreenshot.jpeg?tl_px=16,18&br_px=3456,1941&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=745,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/baedd36b-5862-43e5-94a0-930018910ed8/ascreenshot.jpeg?tl_px=1568,727&br_px=3288,1688&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ccb80766-0df5-4791-83de-d2430a456da5/ascreenshot.jpeg?tl_px=1736,507&br_px=3456,1468&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=806,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/4bf76029-18f8-4b33-bc14-20d60ccbdbdf/ascreenshot.jpeg?tl_px=1736,731&br_px=3456,1692&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=820,276

Step 13: You now need to define the output based on the processing of the input.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d9bc4328-f5b6-46f5-8051-2b9c281dc491/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=990,384

In this example, the output is the assembled product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/7c0fb588-248b-49b0-8a6c-f17ddc3da478/ascreenshot.jpeg?tl_px=1736,989&br_px=3456,1950&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=622,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/e742cbaf-8669-400c-9c10-21e337bde110/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=784,333

Step 14: Select the next process destination or workstation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ce203b40-3098-457f-8c1d-14b15ca2d568/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=781,548

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/75cbd655-0813-446e-ad67-0050771975e7/ascreenshot.jpeg?tl_px=1726,1024&br_px=3446,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,441

Step 16: You can add a description of the state in which the product is in at the time of completion of the current process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/c6981d5a-1bd9-462e-a757-089e922697fc/ascreenshot.jpeg?tl_px=1046,1024&br_px=2766,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,504

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ce580ef6-38fd-4551-bc4a-fda800d17c7b/ascreenshot.jpeg?tl_px=1046,1024&br_px=2766,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,504

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/84e6861a-7cca-4ff8-9c0f-7287c4f51fee/ascreenshot.jpeg?tl_px=1196,1024&br_px=2916,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,371

Step 18: You now need to repeat the Input, Process and Output for the second stage or process attached to the routing of this product. You will select the next tab which resembles the next step in the process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/1084d037-f14b-4b05-83bb-89bd4f1176c1/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=290,187

You output from the previous process will act as the input for the current process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d76ebc3b-505e-48a2-b824-d33edfd54841/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=309,132

Step 19: You need to select the assembly or output at this stage.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/3860923d-9820-4fb8-9476-cece250c01bc/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1014,390

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/029cbe4c-05ce-4d86-8685-5a0385bf1383/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=850,336

Step 20: Since this is the final stage of the route, you need to select the output destination, which is the final assembly warehouse area type.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/2c328664-04ae-4b41-b5dd-52e81c16500a/ascreenshot.jpeg?tl_px=1718,1024&br_px=3438,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,507

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/3bd27fcd-5ba7-4a0d-9a97-e904ff05abca/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=538,441

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d42f9204-65e6-471f-955b-853f00e49e61/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=542,545

Once again, you can add a description of the final state.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/2e70775c-ac90-4e9c-b0ed-858d00586677/ascreenshot.jpeg?tl_px=934,1024&br_px=2654,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,500

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/b712c6fc-bace-436c-8814-e31183ac93d9/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=582,481

The route has now been created and the product can be scheduled for production.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/cd0ae444-57e9-407d-9981-2b327e5f1105/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=310,143

- Create Sub Contracted Routes

Step 1: Select "Routing"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/d5b878d0-aa9c-4df0-9d25-767afd19764c/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=419,171

Step 2: Select "Sub Contracted Routes"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/4c9cf67b-2723-43d7-a12d-4b031dfcc2ba/ascreenshot.jpeg?tl_px=78,7&br_px=1797,968&force_format=png&width=1120.

0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: You will view a global list of previously created sub contracted routes. Select "Create Sub Contracted Route".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/68bc6b5f-c56e-40c3-8f26-eb0dc1264a70/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1040,70

Step 4: Enter the name of the route

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/5880296e-213a-4fcd-81ad-0a6bfc7d209d/ascreenshot.jpeg?tl_px=47,0&br_px=2340,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,197

Step 5: Select the sub contractor which was created within the procurement module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/887be440-98ba-4a83-a7be-b2ce07c53d77/ascreenshot.jpeg?tl_px=879,0&br_px=3172,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,189

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/c5671c73-460b-4686-99cf-951e623bf99b/ascreenshot.jpeg?tl_px=1152,225&br_px=2872,1186&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 6: Select the different assemblies and Items which need to be sent to the sub contractor to complete into the final state.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/71216c0c-1415-4bbc-9790-859d8eeba4c1/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=334,204

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f68c286e-ee69-4886-9864-000a3026bedd/ascreenshot.jpeg?tl_px=358,527&br_px=2078,1488&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/00b02b78-9fba-4b7a-8c14-

cc8c45051ca5/ascreenshot.jpeg?tl_px=132,263&br_px=1851,1224&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/69064710-cf4b-41ea-91e8-bcdbfa76602a/ascreenshot.jpeg?tl_px=42,497&br_px=1761,1458&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 7: The selected items and assemblies will now be populated. You must now add the set of instructions which the sub contractor needs to follow.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/5aba71d4-524f-4305-b39a-309f348c5169/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=546,362

Step 8: Select the Assemblies and Items which you will receive back from the sub contractor.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/63a9ba3f-28f7-4301-9d73-75ced0e7b43a/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=339,476

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/dfc0e339-6f1d-4f01-8486-1a3905bf3356/ascreenshot.jpeg?tl_px=404,973&br_px=2124,1934&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 9: You must specify the source item which the completed item or assembly was created from.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/814b3c25-7000-4d74-ac81-aef7de30e799/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=882,422

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/7d2e126d-788c-477d-8b8b-f7bb0010abd0/ascreenshot.jpeg?tl_px=1736,599&br_px=3456,1560&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=721,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f6922a0d-02dc-44aa-9f96-

bca66765dff6/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=633,339

Step 10: Upon completion, select "Create Route".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9fc48ce3-e52c-4e5d-a4ed-697578387266/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=923,111

Sales Overview

Sales Module Description

This module manages all aspects of the sales process, including customer relationship management, sales orders, invoicing, pricing, and revenue tracking. It's essential for managing customer interactions and sales transactions effectively. It also allows for the effective management of both internal and external staff.

Sales Module Process Flow

Sales Quote: A sales quote is a document provided to a potential customer that outlines the estimated cost of a product or service. It includes details such as the quantity, unit price, and total price of the items being quoted. Sales quotes are typically used to initiate the sales process and provide customers with an understanding of the pricing for their desired products or services.

Sales Order: A sales order is a formal request made by a customer to purchase goods or services. It includes specific details such as the quantity, description, and agreed-upon price of the items being ordered. Sales orders are generated based on the customer's acceptance of a sales quote and serve as a confirmation of the purchase.

Fulfilment Order: A fulfilment order is created to initiate the process of fulfilling a customer's order. It includes information about the items to be shipped, their quantities, and any special instructions related to packaging or delivery. Fulfilment orders are typically used by warehouse or fulfilment teams to pick, pack, and ship the ordered items to the customer.

Sales Invoice: A sales invoice is a document sent to the customer after the products or services have been delivered. It includes detailed information such as the itemized list of products or services provided, quantities, prices, any applicable taxes, and the total amount due. Sales invoices serve as a formal request for payment and provide a record of the transaction.

The process from a sales quote to a sales order to fulfilment and finally to a sales invoice involves the following steps: A sales quote is created and sent to the customer, outlining the estimated cost of the requested products or services. Once the customer accepts the quote, a sales order is generated, confirming the purchase.

The procurement team will create a production plan based on the sales order products, assemblies or items and their associated quantities. Upon production completion, the fulfilment team then prepares a fulfilment order, picking and packing the items for shipment. After the items are delivered to the customer, a sales invoice is generated and sent to request payment for the completed transaction.

Sales Sub Modules

- Sales Personnel

Sales personnel are internal employees who earn either a wage or a combination of wage and commission to sell manufactured products to current or prospective customers.

They have access to a personalized dashboard and are responsible for managing the sales cycle and customer relationships.

Sales employees can create quotes, sales orders, sales invoices and customer within their allocate permissions and dashboard.

- Customer Management

Customer management involves the creation and oversight of active, inactive, and prospective customer leads. Each customer has a dedicated profile and dashboard for assessing insightful metrics, and sales cycles can be initiated directly from their dashboard.

- Sales Order Management

Sales order management is a global module which handles and oversees customer orders from initial quotation to final invoicing. It involves creating quotes, converting them into sales orders, generating invoices, and tracking the progress of purchased assemblies, products, and items as they move through production. This ensures that all aspects of the sales order, from pricing and order details to production status and delivery schedules, are efficiently managed and monitored, providing a seamless experience for both the sales team and the customer.

- Customer Returns

The ArcFlow Customer Return feature enables you to manage the entire return process efficiently. It allows customers to request return authorizations and facilitates the receipt and inspection of returned items. The feature supports processing refunds or replacements and updating inventory records accordingly. It also provides detailed tracking and reporting on return reasons and statuses, ensuring that returns are handled swiftly and accurately to maintain customer satisfaction.

- Sales Configurations

The Sales Configuration module in our system allows you to set up and manage pricing structures, including price breaks and percentage discounts. These discounts can be assigned to sellable products, assemblies, and individual items, or directly to specific customers. This flexibility enables you to create tailored pricing strategies that cater to various customer segments and sales scenarios, ensuring competitive and attractive pricing for your products while maximizing profitability and customer satisfaction.

- Warranties

Our warranty system enables you to efficiently manage product warranties by tracking warranty terms and conditions for each item sold. It allows you to register warranty details at the time of sale, monitor warranty periods, and handle claims and repairs. The system also supports the processing of replacements or refunds under warranty and provides comprehensive reporting on warranty claims and statuses, ensuring that both customers and internal teams have clear visibility and management of warranty-related activities.

- Sales History

Our Sales History module provides a comprehensive record of all past sales transactions. It allows you to view detailed information on each sale, including product details, quantities, prices, customer information, and dates of transactions.

- Dashboard

The Sales Dashboard sub-module on the ArcFlow ERP system provides a real-time overview of sales performance through visual charting and metric collection. Users can filter date ranges to customize the displayed data. The dashboard tracks metrics such as sales volume, highest-performing sellable products, assemblies, and items, and shows customer segments based on sales volume. This comprehensive view helps businesses quickly assess their sales activities and make informed decisions.

Sales Personnel

Overview Description:

The ArcFlow Sales Personnel Sub-Module is designed for employees who earn either a wage or a combination of wage and commission. These sales personnel manage the relationship between the company and their customers, actively selling products and addressing customer needs. They can initiate quotes, sales orders, and invoices, as well as monitor the status of order fulfillment. Additionally, they have access to personalized dashboards that enable them to track their performance and gain insights into their sales trends, optimizing their sales activities and customer interactions.

Process Flow:

Overview Video:

Sales_Persons.mov

Walkthrough Documentation:

- Create Sales Person

Step 1: Select "Internal Sales Personnel"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/1b7c9a99-65e8-4df0-bcb2-0f2fc58c1858/ascreenshot.jpeg?tl_px=0,43&br_px=2293,1324&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=273,277

Step 2: You will view a global list of all previously created sales personnel. Select "Create" to add additional sales personnel.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/cdba85fb-e0c3-43c5-9420-eced39d70341/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1005,151

Step 3: Enter in the sales person personal information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/34716ed2-e1f8-4fd3-bf3d-af5a7fe0566b/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=350,161

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7ce7f1ba-a216-4f61-b8c6-664b098ce966/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=540,264

Enter in their internal employee ID.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/da7d6016-e109-4d63-8fb0-36a7b4e91214/ascreenshot.jpeg?tl_px=0,117&br_px=2293,1398&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=359,277

Select the Sales Territories in which they have authorisation to sell to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/e5e37382-e285-4487-9a4f-2f7537c1a315/ascreenshot.jpeg?tl_px=845,89&br_px=3138,1370&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/a783c292-5ee1-461d-a853-81b212b2c8e5/ascreenshot.jpeg?tl_px=1020,505&br_px=2740,1466&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 4: Utilise the search functionality to add their current location of work.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/9a2d9fa2-335b-43a6-9e5c-a129d2931b1e/ascreenshot.jpeg?tl_px=0,22&br_px=3439,1945&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=318,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/c7bdedeb-f19a-49d5-8f9b-f1e6f06c21b4/ascreenshot.jpeg?tl_px=0,699&br_px=1719,1660&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=421,277

Step 5: Enter the sales persons contact information and position in the company.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/6ab780b1-bb09-445c-b922-1199f3f77115/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=162,459

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/30a68be6-32bc-4382-98ce-103cc8919beb/ascreenshot.jpeg?tl_px=0,1024&br_px=1719,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=301,418

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/98bd1fdc-a33d-490e-b833-7d746c42bd34/ascreenshot.jpeg?tl_px=855,704&br_px=3148,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,453

Step 6: If you sales person has set monthly target and work on a commission rate, you must select the "Commissions and Targets" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/a57abc46-e832-4efb-9ac8-e019d2d2e981/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=204,105

Select their allocated sales target to assign their performance expectation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0db156e1-db51-4c3f-8994-f7d7007a2b34/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=175,197

You have the ability to create a new subjective sales target for this sales person.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7e7e398e-03fb-4369-bac7-547228e92a81/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=177,229

Enter in their Gross Sales Commission Rate. This is a percentage based on the Gross Sales Value.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/d12cbf90-2cf3-4be6-856a-a8a740ffcd14/ascreenshot.jpeg?tl_px=0,28&br_px=3439,1951&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=174,277

Enter in the day of the month in which the sales person is paid their monthly commission.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/1c3332ad-e751-4ac5-8c06-e2f94879a1bc/ascreenshot.jpeg?tl_px=16,32&br_px=3456,1955&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=598,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/ad2bd26c-0382-48cf-87ea-0e79439bc558/ascreenshot.jpeg?tl_px=1084,885&br_px=2804,1846&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 7: If you would like to attached documents regarding the Sales Person, you can select the "Documents" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/1ec065bf-a508-4d93-bfe0-3464ba506652/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=292,109

Step 8: Select the "Create" button to create the sales person.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/5e1fdff2-fd00-4e1c-8424-8c0bbf2e3e92/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=11

20.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=976,111

- Sales Person Dashboard Walkthrough

Step 1: Select "Internal Sales Personnel"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/213e326e-68f3-4448-a624-49e6f180a831/ascreenshot.jpeg?tl_px=0,55&br_px=2293,1336&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=272,277

Step 2: Select a specific sales person.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/00d9ce1f-5d53-40c7-a675-452162c28560/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=275,270

Step 3: The sales person dashboard will be presented with the listed charting, metrics and performance indicators. You can select "Order Management" to view and create sales cycles and customer management.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/83ea6e19-c012-49d2-9cd2-9571ab66cdf0/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=227,61

Step 4: The "Order Management" tab will outline and the ability to view Sales Quotes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/93805b27-2f60-49a7-b2e1-97488367760a/ascreenshot.jpeg?tl_px=0,43&br_px=2293,1324&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=315,277

The ability to view and create "Sales Orders"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7404f157-3d53-4a65-b487-10ef13eb3c01/ascreenshot.jpeg?tl_px=112,203&br_px=1831,1164&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

The ability to view and create "Proforma Invoice"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/c78c2477-f599-445e-b848-36ab15de0685/ascreenshot.jpeg?tl_px=400,211&br_px=2120,1172&force_format=png&width=

1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

The ability to generate and view "Sales Invoices"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/400a7c34-43a5-4934-8a98-e15bc47b526f/ascreenshot.jpeg?tl_px=704,197&br_px=2424,1158&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

The ability to view and create "Customers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4853d6a2-8cd4-43ac-8fa5-0b31cc0624ac/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=210,109

- Edit Your Profile

1\. Click on your profile in the list of sales people.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/3c98448b-4389-4e87-aa6b-a56436a12411/ascreenshot.jpeg?tl_px=0,230&br_px=859,711&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=266,212

2\. Click the edit button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7ce167cf-4d18-477a-af20-3cd0b2f4c403/ascreenshot.jpeg?tl_px=22,0&br_px=882,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,208

3\. You can edit your contact information and address on the first screen.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/093d2295-7373-4693-ba38-7de8fe364e34/user_cropped_screenshot.jpeg?tl_px=2,0&br_px=2296,900&force_format=png&width=1120.0

4\. On this tab you can change your Commission & Targets

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/780a1a00-508a-451c-ac7a-b804bf04374f/user_cropped_screenshot.jpeg?tl_px=2,0&br_px=2296,566&force_format=png&width=1120.0

5\. On the final page you can upload any relevant documentation for your profile. This can include certification and licences.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/5ad21b65-a9dc-4c08-95df-90132bafcd1e/user_cropped_screenshot.jpeg?tl_px=2,0&br_px=2296,634&force_format=png&width=1120.0

6\. Finally you click save to save your changes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/bc400da7-975a-4eb9-9214-ce9bf02a4b8e/File.jpeg?tl_px=1439,0&br_px=2299,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=746,126

- Create Sales Quote

1\. In the order management screen under the sales quote section click the create quote button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/aaeb1e4b-8546-4c19-bbf5-3e9f60df38a9/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1015,92

2\. Start entering in your customer name to search through your customer database.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a3212df9-c841-4f2f-9b12-9c252f0a28e9/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=298,104

3\. Select a customer and their details will auto populate.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/be8ff515-be27-4f6f-a1c9-8b77f9040d79/ascreenshot.jpeg?tl_px=51,79&br_px=1198,720&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

4\. Select the desired shipping address of the customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7e7368a5-54bc-4c57-a28a-950ea431b8ad/ascreenshot.jpeg?tl_px=167,146&br_px=1027,627&force_format=png&width=8

60&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

5\. Set the date at which the sales quote should expire.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ef13cd32-11b7-4ebb-9388-3dc3b4d2e1c8/ascreenshot.jpeg?tl_px=1066,56&br_px=1926,537&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Input the desired delivery date of the customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/baeb5d41-49a0-4f31-ac1d-653dc0359700/ascreenshot.jpeg?tl_px=1040,87&br_px=1900,568&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. Select the warehouse which will be providing this order from.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/be06cdd8-24c6-4300-989f-5a1adffd0111/ascreenshot.jpeg?tl_px=1439,285&br_px=2299,766&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=581,212

8\. Fill in the product code here to search through your product database.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/014d7964-51a2-4033-8068-9145971825e5/ascreenshot.jpeg?tl_px=0,393&br_px=859,874&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=241,212

9\. Enter the requested quantity of product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7409bee2-40cb-4ce6-ba50-72541d980f55/ascreenshot.jpeg?tl_px=275,392&br_px=1135,873&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. In the orange block you can enter in any terms and conditions for the quote. \ In the yellow block you can add any additional comments.\ In the red block you can decide if you want the tax to be displayed that is associated with the invoice.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7bf1902e-ea08-44b4-9d44-c65449f320bf/user_cropped_screenshot.jpeg?tl_px=2,344&br_px=2296,1625&force_format=png&width=1120.0

11\. Click "Create" to create the invoice. This will also

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/af80f960-9f61-4cd9-a00d-8a51e4a991f9/ascreenshot.jpeg?tl_px=1439,0&br_px=2299,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=757,115

- Send off an Sales Quote

1\. Here we have a list of the sales quotes we have generated. However we haven't sent this top quote off yet.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2b52a33e-aa97-40d1-82d2-c500f36f2946/user_cropped_screenshot.jpeg?tl_px=2,0&br_px=2296,802&force_format=png&width=1120.0

2\. Lets drop the quote down to see what products form part of it.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9847a8d5-5997-4ffb-a859-3c26da436159/ascreenshot.jpeg?tl_px=0,214&br_px=859,695&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=109,212

3\. Now that we know what this quote is for we can send it off. Select the drop down button marked in orange.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/f341f7b9-97d5-4f80-ad9f-18cc489a2dcd/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1035,186

4\. To send the quote directly using the built in email system select the button highlighted. This quote will be sent off and will appear to come from your associated email address so it will be familiar to the customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/f3262ad0-dcd0-482b-a2d0-80ff37b47a2f/ascreenshot.jpeg?tl_px=1439,215&br_px=2299,696&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=689,212

5\. Alternatively you can use this button to download the pdf of the quote to send manually.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0dcdb785-eaa6-457c-bbe6-3d5ebec28139/ascreenshot.jpeg?tl_px=1439,214&br_px=2299,695&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=607,212

- Create Sales Order

1\. There are 2 ways to create a Sales Order. You can either convert a Sales Quote directly to a Sales Order or you can make a Sales Order from scratch. To convert a quote you go to the sales quote page and then click this button to convert the quote to a Sales Order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/55f3d8af-01fa-45df-aaa4-2a71b263af53/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=893,188

2\. Here you can make any necessary changes to the information before converting it or proceed by click create.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9d7c7b87-8fe9-4af6-b8c2-f010597bcd09/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1041,38

3\. To create a Sales Order from scratch you navigate to this tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/8c2b2e10-259d-4590-87ba-2ba43b24208a/ascreenshot.jpeg?tl_px=0,143&br_px=859,624&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=325,212

4\. Click "Create Sales Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2d19deda-1d1c-47e9-af7e-7793f4c9f4ed/ascreenshot.jpeg?tl_px=1439,24&br_px=2299,505&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=651,212

5\. Enter in the relevant information for the Sales Order the same way you did with the Sales Quote.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ca81bf83-4fb0-404c-8443-bbab00670e90/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=512,103

6\. Then click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7ca2b035-1874-450c-8a37-8913ae689d44/user_cropped_screenshot.jpeg?tl_px=1439,0&br_px=2299,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=748,120

- Create Proforma Invoice

1\. Lets create a Proforma invoice from one of our Sales Orders

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d967ffc4-8bed-41b9-a8b4-d61f65956e75/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=2293,725&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=512,243

2\. Click "Create Proforma Invoice"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c4ff5660-e159-4371-90fe-1ea4728c8e9e/ascreenshot.jpeg?tl_px=1439,34&br_px=2299,515&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=706,212

3\. Dropdown the list of Sales Orders.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7dcd49ce-428b-47ec-b261-c5c34801ed98/ascreenshot.jpeg?tl_px=876,765&br_px=1736,1246&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. Select your chosen Sales Order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9d422043-78b1-44d6-ab12-10ad977a7427/ascreenshot.jpeg?tl_px=714,890&br_px=1574,1371&force_format=png&width=

860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

5\. Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/8f6f5b8e-b1a5-4a2a-8dd5-6ecb0d07fb44/ascreenshot.jpeg?tl_px=836,888&br_px=1696,1369&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Here you can make any necessary change and once you are satisfied you can click "Create".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c3dab39c-2a85-4bf7-b88f-4b63a550e91e/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1039,36

- Create Sales Invoice

1\. Click "Create Invoice"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/f7455c6a-9844-434d-9961-0c6f13e8ba77/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1004,109

2\. Select your chosen Sales Order from the dropdown.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4ff524a1-ca32-4206-846b-5327d574ce71/ascreenshot.jpeg?tl_px=827,762&br_px=1687,1243&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/87e9ef21-5096-48dc-8787-63e38addb090/ascreenshot.jpeg?tl_px=792,880&br_px=1652,1361&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. Here you can review the Sales Quote and make any necessary changes. If you are satisfied you can click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/fc770600-f695-40ec-9093-15da20af87d2/ascreenshot.jpeg?tl_px=1439,0&br_px=2299,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=734,119

- Create Customer and Customer Management

1\. Click "Create Customer"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/44d63d99-34d2-438e-acae-d8d0d3341851/ascreenshot.jpeg?tl_px=1439,17&br_px=2299,498&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=675,212

2\. Enter the customer name.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ed6bbb56-9c08-4116-be8b-f90194101b08/ascreenshot.jpeg?tl_px=616,57&br_px=1476,538&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Select the customer group.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/876526d0-2f89-41fe-9e5b-df86033ebdc2/ascreenshot.jpeg?tl_px=868,46&br_px=1728,527&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4766d156-fc75-4c14-91b3-53ed1b023830/ascreenshot.jpeg?tl_px=834,198&br_px=1694,679&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

5\. Select "Customer Status"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/24efb2dc-16db-450e-91d4-26df59c4df3e/ascreenshot.jpeg?tl_px=614,112&br_px=1474,593&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/eae5b678-8281-42a8-8d4d-bd14e2a78174/ascreenshot.jpeg?tl_px=583,155&br_px=1443,636&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. Select their Territory.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c1b12e7e-c940-4656-ad54-a1235545e4e9/ascreenshot.jpeg?tl_px=814,108&br_px=1674,589&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

8\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a3a7a440-8ffc-4167-888c-1a1af95d422d/ascreenshot.jpeg?tl_px=760,231&br_px=1620,712&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. Enter their registration number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2faf63ec-c3ec-4a91-85b0-4bcb5355a7e9/ascreenshot.jpeg?tl_px=516,170&br_px=1376,651&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. Search for their address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/916754ac-2efa-4954-a627-c9bb67559459/ascreenshot.jpeg?tl_px=521,353&br_px=1381,834&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

11\. Enter their tax number and tax jurisdiction.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e60a45d2-b71e-4b88-bfdc-183058fd805b/ascreenshot.jpeg?tl_px=590,660&br_px=1450,1141&force_format=png&width=8

60&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

12\. Click "Collection Jurisdiction"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e04d584c-4e01-4115-a61f-91c5b69b14ec/ascreenshot.jpeg?tl_px=873,656&br_px=1733,1137&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

13\. Click "Contact"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/77cc0bd7-afd1-4b79-bd49-3d061fc94751/ascreenshot.jpeg?tl_px=504,0&br_px=1364,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,170

14\. Click "Add Another Contact"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c12d5435-0003-445a-be58-c0c285d18376/ascreenshot.jpeg?tl_px=414,63&br_px=1274,544&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

15\. Enter the name of the contact information of the customer or employee.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9e8a94bd-764e-4ac2-8131-f514e08aebe6/ascreenshot.jpeg?tl_px=411,101&br_px=1271,582&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

16\. Click "Orders & Finances"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/8a06186e-9c1f-49ae-914a-3283b438f1ab/ascreenshot.jpeg?tl_px=516,0&br_px=1663,640&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,176

17\. Enter their ordering and financing infomation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/cad20eef-0388-4727-b294-769c5874e378/ascreenshot.jpeg?tl_px=510,115&br_px=1370,596&force_format=png&width=8

60&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

18\. Click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0ac319fb-5822-488c-8dc6-c60f6b76e2e1/ascreenshot.jpeg?tl_px=1439,22&br_px=2299,503&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=734,212

Customer Management

Overview Description:

The ArcFlow Customer Management Sub-Module, customer management encompasses the comprehensive creation and oversight of active, inactive, and prospective customer leads. Each customer is assigned a dedicated profile within the system, equipped with a personalized dashboard tailored to assess insightful metrics and analytics.

This dashboard provides valuable data on customer interactions, purchase history, and preferences, empowering sales personnel to make informed decisions and personalize their approach.

Moreover, the integration of sales cycle initiation directly from the customer dashboard streamlines the process, allowing for seamless transition from lead generation to conversion. Through this robust module, ArcFlow enables businesses to effectively manage their customer relationships and drive sales growth.

Process Flow:

Overview Video:

Sales_Customer_Management.mov

Walkthrough Documentation:

- Create Customer or Lead

1\. Click "Create Customer"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/44d63d99-34d2-438e-acae-d8d0d3341851/ascreenshot.jpeg?tl_px=1439,17&br_px=2299,498&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=675,212

2\. Enter the customer name.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ed6bbb56-9c08-4116-be8b-f90194101b08/ascreenshot.jpeg?tl_px=616,57&br_px=1476,538&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Select the customer group.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/876526d0-2f89-41fe-9e5b-df86033ebdc2/ascreenshot.jpeg?tl_px=868,46&br_px=1728,527&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4766d156-fc75-4c14-91b3-53ed1b023830/ascreenshot.jpeg?tl_px=834,198&br_px=1694,679&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

5\. Select "Customer Status"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/24efb2dc-16db-450e-91d4-26df59c4df3e/ascreenshot.jpeg?tl_px=614,112&br_px=1474,593&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/eae5b678-8281-42a8-8d4d-bd14e2a78174/ascreenshot.jpeg?tl_px=583,155&br_px=1443,636&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. Select their Territory.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c1b12e7e-c940-4656-ad54-a1235545e4e9/ascreenshot.jpeg?tl_px=814,108&br_px=1674,589&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

8\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a3a7a440-8ffc-4167-888c-1a1af95d422d/ascreenshot.jpeg?tl_px=760,231&br_px=1620,712&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. Enter their registration number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2faf63ec-c3ec-4a91-85b0-4bcb5355a7e9/ascreenshot.jpeg?tl_px=516,170&br_px=1376,651&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. Search for their address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/916754ac-2efa-4954-a627-c9bb67559459/ascreenshot.jpeg?tl_px=521,353&br_px=1381,834&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

11\. Enter their tax number and tax jurisdiction.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e60a45d2-b71e-4b88-bfdc-183058fd805b/ascreenshot.jpeg?tl_px=590,660&br_px=1450,1141&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

12\. Click "Collection Jurisdiction"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e04d584c-4e01-4115-a61f-91c5b69b14ec/ascreenshot.jpeg?tl_px=873,656&br_px=1733,1137&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

13\. Click "Contact"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/77cc0bd7-afd1-4b79-bd49-3d061fc94751/ascreenshot.jpeg?tl_px=504,0&br_px=1364,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,170

14\. Click "Add Another Contact"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c12d5435-0003-445a-be58-c0c285d18376/ascreenshot.jpeg?tl_px=414,63&br_px=1274,544&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

15\. Enter the name of the contact information of the customer or employee.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9e8a94bd-764e-4ac2-8131-f514e08aebe6/ascreenshot.jpeg?tl_px=411,101&br_px=1271,582&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

16\. Click "Orders & Finances"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/8a06186e-9c1f-49ae-914a-3283b438f1ab/ascreenshot.jpeg?tl_px=516,0&br_px=1663,640&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,176

17\. Enter their ordering and financing infomation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/cad20eef-0388-4727-b294-769c5874e378/ascreenshot.jpeg?tl_px=510,115&br_px=1370,596&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

18\. Click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0ac319fb-5822-488c-8dc6-c60f6b76e2e1/ascreenshot.jpeg?tl_px=1439,22&br_px=2299,503&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=734,212

- View and Manage Active or Inactive Customers

Step 1: Select "Customer Management"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4ea7d3ca-2889-48c3-ba61-d185b2a95112/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=426,171

Step 2: You will view a global list of all customers. You can select a listed customer to manage and view orders.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/8a8e7554-3f31-46cc-b503-14f794900293/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=158,274

Step 3: If you would like to edit existing information on the customer, select the "Edit" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/8b9e450a-fa12-401d-ac34-516b52791f22/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=389,195

You are able to edit the customer general information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/567aec86-830c-4d04-b15c-2425c0c85e72/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=382,180

You are able to edit the customer contact information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/fd091676-656c-474b-82a5-ef5494e06f0b/ascreenshot.jpeg?tl_px=236,0&br_px=1955,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,249

You are able to edit the customer orders and finance information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/30aeb728-8db5-4ba0-b3bb-fbc1e62481cd/ascreenshot.jpeg?tl_px=199,0&br_px=2492,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,176

You are able to edit and upload the customer documentation. To go back to the customer dashboard, simply select the customers name in the bread crumb trail.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/18c13522-67ea-4cb3-ab54-edac17674c2d/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=426,50

Step 4: You can create, view and manage all customer orders by selecting the "Order Management" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7385261e-1ff1-490b-8b5c-dd2420d32c52/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=396,106

The initial tab is all the created sales quotes. You are able to create new sales quotes, adjust existing quotes or create sales orders from accepted quotes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/859ac117-e864-4362-8ed8-94baafd3fe1a/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=193,186

The sales orders tab will outline all accepted quotes or created sales orders. The table allows you to view the status of sales orders to track progress on the order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/07407a1c-b67b-4886-aaec-8de2c450b70e/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=282,189

The next tab is the proforma invoice tab. You can view all created proforma invoices and have the ability to create new proforma invoices based on created sales orders.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/cfe79e66-7985-4ba2-ae00-88891eb91c8c/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=372,186

The final tab is the sales invoice tab. This tab displays all created sales invoices awaiting customer payment. You can create new sales invoices based on created sales orders and have the ability to capture the customer payment status against the sales invoice.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0881235c-523d-4442-b421-9d07a2516f03/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=128,58

- Managing and Converting Leads

Step 1: Select "Customer Management"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/483d2e64-42b7-4fd4-8379-fe236f648eb3/ascreenshot.jpeg?tl_px=271,0&br_px=2564,1281&force_format=png&width=112

0.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,269

Step 2: Select "Leads"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3f3471c3-8cb7-4584-997f-2bdebacaf9dc/ascreenshot.jpeg?tl_px=0,287&br_px=1719,1248&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=405,277

Step 3: You can enter the initial contact date, next contact date and current state of the customer. You are able to use this as a CRM tracking tool.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/676c14d8-38a6-44b7-a93d-6378e3e34f29/ascreenshot.jpeg?tl_px=16,8&br_px=3456,1931&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=570,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/eb1fc929-b384-4160-8e33-541b1c62515c/ascreenshot.jpeg?tl_px=1018,489&br_px=2738,1450&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4ee5e9e5-528c-46ee-a44c-868945b428a1/ascreenshot.jpeg?tl_px=1506,1024&br_px=3226,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,429

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/aa00b484-20f4-4c17-839b-9b8493871237/ascreenshot.jpeg?tl_px=1486,485&br_px=3206,1446&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/9f233f3d-250b-4462-bfdf-a90e7a959c8d/ascreenshot.jpeg?tl_px=1736,603&br_px=3456,1564&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=725,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/73c385e0-9733-468f-ab02-38e99b8aa9bd/ascreenshot.jpeg?tl_px=1736,485&br_px=3456,1446&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=655,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/cdf26c3f-a973-4d86-a570-e8fde73d2bc9/ascreenshot.jpeg?tl_px=1736,487&br_px=3456,1448&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=645,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b7ad91f6-78e3-46f0-b5a8-f9ddf9c8f389/ascreenshot.jpeg?tl_px=1624,693&br_px=3344,1654&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 4: Select the lead if you would like to change the status to an active customer or any other type of status.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/9d012255-f378-4229-be63-1d532c7a0881/ascreenshot.jpeg?tl_px=0,475&br_px=1719,1436&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=387,277

Step 5: Select "Edit"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4fdcacdd-35bb-4b4d-ab90-521a8f771817/ascreenshot.jpeg?tl_px=12,0&br_px=1731,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,270

Step 6: Select the "Customer Status" dropdown and change to the updated and appropriate status.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/09db2638-99c8-46d4-b383-75319dd16fca/ascreenshot.jpeg?tl_px=0,71&br_px=2293,1352&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=383,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/976b5e21-b858-488e-8303-570462a0cf52/ascreenshot.jpeg?tl_px=0,171&br_px=2293,1452&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=309,277

Sales Order Management

Overview Description:

Within the ArcFlow Sales Order Management Sub-Module, sales order management encompasses the comprehensive process of overseeing customer orders from inception to completion. This entails a series of steps, beginning with the creation of quotes and their subsequent conversion into sales orders.

The system facilitates the seamless generation of invoices and enables the tracking of purchased assemblies, products, and items as they progress through various stages of production. By providing real-time updates on pricing, order details, production status, and delivery schedules, the module ensures that all aspects of the sales order are efficiently managed and monitored. This comprehensive approach enhances transparency and communication between the sales team and customers, resulting in a seamless and satisfying experience for both parties.

Definitions:

Sales Quote

A sales quote is a document provided to a potential customer that outlines the estimated cost of a product or service. It includes details such as the quantity, unit price, and total price of the items being quoted. Sales quotes are typically used to initiate the sales process and provide customers with an understanding of the pricing for their desired products or services.

Note: During the sales cycle, you are able to skip the sales quote stage, but the initial step has to be the sales order. The sales order is feeder data into the manufacturing module which alerts the production team of up and coming orders for production.

Sales Order

A sales order is a formal request made by a customer to purchase goods or services. It includes specific details such as the quantity, description, and agreed-upon price of the items being ordered. Sales orders are generated based on the customer's acceptance of a sales quote and serve as a confirmation of the purchase.

Proforma Invoice

A proforma invoice is a preliminary bill of sale sent to buyers in advance of a shipment or delivery of goods. It details the types and quantities of products, their prices, and other important terms such as delivery and payment terms, but it is not a demand for payment. Proforma invoices are commonly used to provide an estimate or quote to the buyer, allowing them to review and approve the details before the final invoice is issued and the transaction is completed. This document helps ensure transparency and agreement on the terms of the sale before the actual transaction takes place.

Sales Invoice

A sales invoice is a document sent to the customer after the products or services have been delivered. It includes detailed information such as the itemized list of products or services provided, quantities, prices, any applicable taxes, and the total amount due. Sales invoices serve as a formal request for payment and provide a record of the transaction.

Process Flow:

Overview Video:

Sales_Order_Management.mov

Walkthrough Documentation:

- Create Sales Quote

1\. Click "Create Quote"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a7a4d5ee-ed7a-4bf2-b1ae-ab1be4bead3f/ascreenshot.jpeg?tl_px=1439,51&br_px=2299,532&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=699,212

2\. Select the "Customer Name"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/aea3953a-3b09-436c-bfb4-ad91e2ce3daa/ascreenshot.jpeg?tl_px=70,0&br_px=1790,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,156

3\. Set the expiry date for the Quote.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/74f4781d-3f1f-4bf8-ba0b-0bd88d514d5e/ascreenshot.jpeg?tl_px=1113,45&br_px=1973,526&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. Select the Shipping Address

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/35bce87a-446d-447b-8990-159e8a46e5a2/ascreenshot.jpeg?tl_px=49,0&br_px=1768,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,185

5\. Set the customers request deliver address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/8a16a974-1809-45d4-87e2-e6fad59fcd22/ascreenshot.jpeg?tl_px=903,99&br_px=1763,580&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Select the warehouse you want to send from.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/3a2a93d3-f61f-4dd9-b2de-2b9d14f76ad9/ascreenshot.jpeg?tl_px=1439,305&br_px=2299,786&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=644,212

7\. Select the product you want to add to the quote.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/41fefc97-0dde-4042-bdf2-6cd63d1a170a/ascreenshot.jpeg?tl_px=0,392&br_px=859,873&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=249,212

8\. Set the requested quantity.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/60e7eebb-e5d9-4ff9-a651-0e5e3f030b87/ascreenshot.jpeg?tl_px=280,398&br_px=1140,879&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. Click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7cae3845-dd77-4872-a6e7-dab686a3b5d6/ascreenshot.jpeg?tl_px=1439,0&br_px=2299,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=764,125

10\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/eaa608df-6712-41ff-99dd-b6a8e5afc642/ascreenshot.jpeg?tl_px=1439,0&br_px=2299,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=714,13

- Edit a Quote

1\. Click here to edit a quote.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/87d0f5ea-6966-4b8a-85fb-37673c70569a/ascreenshot.jpeg?tl_px=1349,236&br_px=2209,717&force_format=png&width=

860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

2\. Here you can make changes to the quote which can then be resent. Once you are done click Save.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d73a39af-a32a-4be5-aa18-ddeb9771efe6/ascreenshot.jpeg?tl_px=5,0&br_px=2299,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1047,34

- Send Sales Quote

1\. To send a quote select the options button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/518b6e63-db4d-4dc5-a620-66aba41849ee/ascreenshot.jpeg?tl_px=1439,243&br_px=2299,724&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=714,212

2\. Click here to have the system send the quote directly via email to the customer. This will appear to come from your regular sales address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/04942c63-812e-4434-998f-4da645082e97/ascreenshot.jpeg?tl_px=1439,247&br_px=2299,728&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=673,212

3\. Alternatively click here to download as a pdf and send it off manually.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/bd59b340-a9a4-48dd-a7a8-6801200b1ff3/ascreenshot.jpeg?tl_px=1439,243&br_px=2299,724&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=587,212

Made with Scribe

- Create Sales Order

1\. There are 2 ways to create a Sales Order. The first is to take a Sales Quote and convert it into a Sales Order. You do this by clicking this button on the Sales Quote page.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/1b80e48e-a44d-4f68-bb6d-c24ebed2782d/ascreenshot.jpeg?tl_px=1468,244&br_px=2328,725&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=432,212

2\. You can then review the details of the Sales Quote and make any necessary changes. If you are happy you can click Create.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2f6de3dd-89c1-4120-b444-59793343f129/ascreenshot.jpeg?tl_px=34,0&br_px=2328,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1034,39

3\. To create a Sales Order from scratch you must first select the Sales Order tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/abc3d87a-4394-4f84-aef5-a2ebdc6b5d9e/ascreenshot.jpeg?tl_px=0,140&br_px=859,621&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=313,212

4\. Click "Create Sales Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/daf8c3a1-b4ea-407e-b8c0-0ee664a5083d/ascreenshot.jpeg?tl_px=1468,41&br_px=2328,522&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=649,212

5\. Select the Customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/22fb4f5b-17b3-4303-9938-43de69170677/ascreenshot.jpeg?tl_px=25,0&br_px=1401,769&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,200

6\. Enter the requested delivery date from the customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a598fdf5-0b86-4f43-acf4-929063e2c133/ascreenshot.jpeg?tl_px=911,100&br_px=1771,581&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. Click "Select Warehouse"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0b50a8cb-fd74-4c45-ae05-db98668bdf0d/ascreenshot.jpeg?tl_px=1468,435&br_px=2328,916&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=660,212

8\. Select the products for this Sales Order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e48d11f5-1ed7-43db-8d8a-c839f275a1e1/ascreenshot.jpeg?tl_px=0,551&br_px=859,1032&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=197,212

9\. Select the quantity of the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/baeb0e8b-ddd2-4d42-a411-424d3d124d06/ascreenshot.jpeg?tl_px=268,543&br_px=1128,1024&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. Click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/84532587-8c2f-49ae-aa64-cfb235e562a3/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=743,115

11\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/da676897-794d-4bbc-860f-9a2e0a672e51/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=407,15

- Send Sales Order

1\. To send a sales order to the customer click the options button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0ddbeac7-91b7-4fdc-9a45-f4de1491dcc5/ascreenshot.jpeg?tl_px=1468,246&br_px=2328,727&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=719,212

2\. This button sends the Sales Order straight from the system to the customers email. This appears as if it came from your email address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d1ce4993-f411-45fc-8911-cdf588b28d0e/ascreenshot.jpeg?tl_px=1468,249&br_px=2328,730&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=663,212

3\. Alternatively you can click the download pdf button which allows you to download the pdf to be sent off manually to the customer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/f52902b8-a7bc-4787-8e68-1636e2d6c521/ascreenshot.jpeg?tl_px=1468,242&br_px=2328,723&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=590,212

- Create Proforma Invoice

1\. Click "Create Proforma Invoice"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/485881f3-68bc-4b11-9418-06785de80146/ascreenshot.jpeg?tl_px=1468,46&br_px=2328,527&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=676,212

2\. Select the Sales Order to create a Proforma from

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0d2d8686-19d9-4c39-8f11-65b587654d50/ascreenshot.jpeg?tl_px=859,767&br_px=1719,1248&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/6e3f8d15-8a02-443d-ab85-f2a930d025bb/ascreenshot.jpeg?tl_px=834,875&br_px=1694,1356&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. Change the details if necessary and then click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9ef8efcd-98b3-4d4b-a8bc-f6aa69f6d202/ascreenshot.jpeg?tl_px=34,0&br_px=2328,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1046,41

- Create Sales Invoice

1\. Click "Create Invoice"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c31f6069-72ce-4cb7-b34b-f49dcd85c3de/ascreenshot.jpeg?tl_px=1468,47&br_px=2328,528&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=730,212

2\. Select the Sales Order you want to create an invoice from.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/39d54ada-0cd4-42b5-be67-1cac3d60ed5a/ascreenshot.jpeg?tl_px=889,761&br_px=1749,1242&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/7f61131a-c1c5-4a09-a963-9b50a566dd96/ascreenshot.jpeg?tl_px=854,884&br_px=1714,1365&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. Ensure the details are correct then click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e7b81551-ab1b-456a-acc8-d78e6d5cdc14/ascreenshot.jpeg?tl_px=34,0&br_px=2328,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1054,37

Made with Scribe

Customer Returns

Overview Description:

It allows customers to request return authorisations and facilitates the receipt and inspection of returned items. The feature supports processing refunds or replacements and updating inventory records accordingly. It also provides detailed tracking and reporting on return reasons and statuses, ensuring that returns are handled swiftly and accurately to maintain customer satisfaction.

Customer Return Definitions:

During the customer return process you will be presented with the following key terms:

Warranty Status

During the warranty setup and creation process you created different warranty classes which we assigned to sellable items, assemblies and products. When you lodge a customer return, you enter in the serial number of the sold good and the system checks for any linked warranties.

You will be presented with the following warranty statuses upon serial number entry:

- No Warranty: There has been no warranties assigned to the sellable item, assembly or product. There will be no coverage for the customer.
- In Warranty: There has been an assigned warranty and the customer will receive a return or services in line with the created warranty coverage.
- Out of Warranty: There has been an assigned warranty, but the warranty expiration date has been reached and there is no longer an active warranty claim.

Issue Date

The Issue Date is the date in which the sellable item, assembly or product was sold or delivered to the customer. The issue date resembles the data in which the warranty is initiated for potential coverage.

Expiration Date

The Expiration Date is the date in which the warranty becomes inactive. This is calculated by adding the standard warranty duration for the assigned warranty to the date of issue outlined above. Any return before the expiration date will entitle warranty coverage.

Process Flow:

Overview Video:

Sales_CustomerReturns.mp4

Walkthrough Documentation:

- Customer Returns

Step 1: Select "Customer Returns"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/299e9259-67b3-4d50-a203-

5a9de6697def/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=908,176

Step 2: You will view a global list of all active and historical customer return. You must select "Log New Return" to create a customer return.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/11ae28f5-4fc3-4664-8984-4021fec9867d/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=982,55

Step 3: You must enter in the serial number of the sold item, assembly or product. The system will then pull the warranty information applied to the item, assembly or product. You will then provide a reason for the return which can be assessed against the warranty terms and conditions. You will then also select the area in which you wish to store the returned item, assembly or product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/fc7072ae-e547-442d-9a9a-0dcaf255f275/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=76,81

The warranty status will be auto populated to state where their is applicable coverage for the return. You can add further details on the return. The issue date and the expiration date will be auto populated. The issue data is the data of sale or delivery and the expiration data is the date in which the warranty expired.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/dda6285b-6bef-486f-9901-45d55aa2581d/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=545,206

Step 4: Select "Log Return"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/036cb830-05fb-4039-b1c0-62636a6d1fc1/ascreenshot.jpeg?tl_px=1164,1024&br_px=2884,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,526

Sales Configuration

Overview Description:

The Sales Configuration module in our system allows you to set up and manage pricing structures, including price breaks and percentage discounts. These discounts can be assigned to sellable products, assemblies, and individual items, or directly to specific customers. This flexibility enables you to create tailored pricing strategies that cater to various customer segments and sales scenarios, ensuring competitive and attractive pricing for your products while maximizing profitability and customer satisfaction.

Please find the descriptions below:

Price Breaks: A price break is a discount or reduction in the price of sellable stock based on the quantity purchased. Initially, price breaks are assigned to sellable stock items. They can also be assigned to specific customers, but only after being applied to the sellable stock. This mechanism reflects deviations in the price of an item depending on the quantity bought, thereby encouraging bulk purchases by offering lower prices for larger quantities.

Percentage Discounts: A percentage discount is a reduction in the price of an item based on a specified percentage, applied during the sale. This type of discount can be created specifically for a customer, which is a required field. Once established, the percentage discount can be assigned to sellable stock linked to that customer. A single percentage discount is added and applied at the time of sale, ensuring that the customer receives the agreed-upon discount on their purchases.

Process Flow:

Overview Video:

Sales_Configuration.mov

Walkthrough Documentation:

- Price Breaks

1\. Lets create a price break for a Product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/e2cbbe5f-0c5d-46dd-8bd7-b6d3df3e4623/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=669,123

2\. First we select the product we want to create a price break for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2e2bd101-6601-44c6-bab4-bb0413664bfe/ascreenshot.jpeg?tl_px=691,664&br_px=1551,1145&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

3\. Click "001-INVR-15-48-LI-(v5)"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/5634a837-8d2e-413c-967b-

79389218b379/ascreenshot.jpeg?tl_px=592,810&br_px=1452,1291&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. We then select which customers will be allowed to utilise this price break.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ef05bb77-d531-429b-b9e7-613d409d0118/ascreenshot.jpeg?tl_px=1040,663&br_px=1900,1144&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

5\. We select the start date for this price break.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/cbfca43e-c900-4617-b41a-d9b55c1bdea3/ascreenshot.jpeg?tl_px=653,730&br_px=1513,1211&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Click this text field. Then we select the date that this price break will expire.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/578b91a6-4eaa-4e13-bd0a-99993803f732/ascreenshot.jpeg?tl_px=881,723&br_px=1741,1204&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. We can now start entering in the Quantity required for each price break

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/2cbd6dd3-75a1-4eae-b4ca-754265a5c0d2/ascreenshot.jpeg?tl_px=606,780&br_px=1466,1261&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

8\. Click this field.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/92b5dc80-958c-4ba3-8d53-fdd915fab77a/ascreenshot.jpeg?tl_px=818,784&br_px=1678,1265&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\. Then we add another break.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/c1045189-2bc4-49a8-9ec0-7da809c447af/ascreenshot.jpeg?tl_px=469,824&br_px=1329,1305&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. Until we have all our price breaks.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4a592ece-5d46-4bc4-be01-79a2483ba707/ascreenshot.jpeg?tl_px=488,813&br_px=1348,1294&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

11\. Click Create when you are done and the price break will be added to the list.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/f578c7ea-538b-4666-8485-a15d7bc318e1/ascreenshot.jpeg?tl_px=874,946&br_px=1734,1427&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

- Percentage Discounts

Step 1: Select "Sales Configuration"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0f40c3a7-7857-4b9c-bfd1-7e4a982b47f5/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=166,329

Step 2: Select "Percentage Discounts"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/f18fed34-dab5-40c1-a195-ad3f521b2c67/ascreenshot.jpeg?tl_px=42,0&br_px=1761,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,251

Step 3: Select "Create Percentage Discount"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/bc5d767e-52d8-4dfe-8d39-d664794a4dbd/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=909,60

Step 4: Select the customer

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/cf18d648-cf8a-48dd-a216-243d871281e9/ascreenshot.jpeg?tl_px=499,201&br_px=2792,1482&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/567dd1e6-3ea0-415c-9f69-e689b7efe885/ascreenshot.jpeg?tl_px=532,609&br_px=2252,1570&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Select the start date

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/eb327b55-da50-4603-8983-e3537b3147e1/ascreenshot.jpeg?tl_px=608,507&br_px=2328,1468&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/d8fd8bd8-f686-46f5-a29f-0fd89d1f41fe/ascreenshot.jpeg?tl_px=848,1024&br_px=2568,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,431

Select the expiration date

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3a8fe499-f010-4e54-830a-c5a1e4575eef/ascreenshot.jpeg?tl_px=1176,495&br_px=2896,1456&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3f465508-a0cd-4cc7-8cbf-a673609d376f/ascreenshot.jpeg?tl_px=945,1024&br_px=2665,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,493

Select the sellable stock you wish to assign the percentage discount to

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/505849ef-ed79-409a-a111-0401c044208c/ascreenshot.jpeg?tl_px=706,585&br_px=2426,1546&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

You can select multiple sellable stock

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/44596352-951e-4281-a1e4-f891d4aee865/ascreenshot.jpeg?tl_px=460,1024&br_px=2180,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,280

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4bb7de4c-8e7c-4bde-8fcb-899df3482a89/ascreenshot.jpeg?tl_px=838,691&br_px=2558,1652&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Apply the percentage discount

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4a726f68-17f9-4b4e-a57b-dc25f091f83b/ascreenshot.jpeg?tl_px=964,613&br_px=2684,1574&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 5: Select "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/62030ef4-7e60-4a40-ab6c-b8aa518a49a9/ascreenshot.jpeg?tl_px=1011,757&br_px=2731,1718&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Warranties

Overview Description:

The ArcFlow warranty sub-module enables the creation of specific warranty classes that can be assigned to various sellable products, assemblies, and items.

This feature categorizes the coverage and details associated with a customer's returned product, assembly, or item. The coverage also specifies whether there is a fee or no fee charged to the customer for the returned order to be either replaced, repaired, and returned.

Key Definitions:

During the warranty creation process you will be presented with key terms. Please find the definitions of each term below:

Warranty Type

A warranty type is a classification within a system that defines the specific terms and conditions of a warranty provided for products, items, or assemblies. By categorizing warranties into different types, a business can more efficiently manage and apply the appropriate warranty terms to various products and ensure customers receive the correct support and service based on their purchase.

Start Date

The start date is the date in which the warranty becomes effective and the coverage is initiated. The system provides for warranties to become effective based on the data of sale or the date of delivery.

Duration

The duration is the amount of time in which the warranty is valid for and induces coverage of the sellable item, assembly or product.

Overview Video:

Warranties FInal.mp4

Walkthrough Documentation:

- Create Warranty

1\. Click "Create Warranty"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/34a33729-a674-4fd9-ab07-2324275d57db/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=662,138

2\. Enter the Warranty name.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/f4bed214-5873-4b41-872f-8abdf2c3ff12/ascreenshot.jpeg?tl_px=100,0&br_px=1083,549&force_format=png&width=983&wat_scale=87&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=459,240

3\. Select Warranty Type

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/b6d68a5c-083a-4fab-b3f4-af9950592b8e/ascreenshot.jpeg?tl_px=1012,101&br_px=1872,582&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. Select Start Date

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/6f5b27d7-75f9-401f-b656-a423d0b5acc9/ascreenshot.jpeg?tl_px=65,30&br_px=1442,799&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

5\. Enter the Duration

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/3812002f-d820-454d-b6fe-6512bf7efb7e/ascreenshot.jpeg?tl_px=885,129&br_px=1745,610&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Add Coverage, Exclusions and Terms and Conditions.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/b8ccdef5-7757-4a08-9ab3-16f32dacffc3/ascreenshot.jpeg?tl_px=0,334&br_px=859,815&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=314,212

7\. Select the products this Warranty applies to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4ec5e185-1483-466e-8d88-09bed94d650d/ascreenshot.jpeg?tl_px=0,814&br_px=859,1295&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=107,212

8\. Click "Create Warranty"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d75790fb-fe02-49b7-a3f8-32dc3741abba/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=745,119

Sales History

Overview Description:

Our Sales History module provides a comprehensive record of all past sales transactions. It allows you to view detailed information on each sale, including product details, quantities, prices, customer information, and dates of transactions. This module supports the analysis of sales trends, customer purchasing behavior, and product performance over time. By offering indepth insights into historical sales data, the Sales History module helps you make informed business decisions, improve forecasting, and enhance customer relationship management.

Overview Video:

Sales History.mp4

Walkthrough Documentation:

- Sales History

Step 1: Select "Sales History"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/77eda876-d4db-48ed-8bcf-92f8c9286066/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=660,328

You will be taken to the Overview tab which displays all historical sales.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b4d6edaa-f107-41c1-ab24-13b53e715d49/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1038,192

You are able to download and view all sales related documentation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/6efe1807-5198-4c99-8701-8efd54741dbd/ascreenshot.jpeg?tl_px=1162,61&br_px=3456,1342&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1015,277

Step 2: Select "Sold Goods" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/fd88cd7f-782a-45e2-aafe-f670167a9141/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=243,201

This tab will display all sold products, assemblies and items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/6962192a-ae7c-4780-902d-1a9fd4307317/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1039,197

You are able to view and download all related documents.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/8889956e-9f69-435a-99cc-79eecca9c87e/ascreenshot.jpeg?tl_px=1736,237&br_px=3456,1198&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=995,276

Sales Dashboard

Overview Description:

The Sales Dashboard sub-module on the ArcFlow ERP system provides a real-time overview of sales performance through visual charting and metric collection. Users can filter date ranges to customize the displayed data. The dashboard tracks metrics such as sales volume, highest-performing sellable products, assemblies, and items, and shows customer segments based on sales volume. This comprehensive view helps businesses quickly assess their sales activities and make informed decisions.

Overview Video:

Sales Dashboad FInal.mp4

Walkthrough Documentation:

- Sales Dashboard

Step 1: Select "Dashboard"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/2fc11811-6b86-4d50-bd5d-9fa9b4bb850b/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=916,317

The sales dashboard will be displayed with all charting and metrics. You are able to filter between date ranges on each chart.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/e30a5c9f-98d1-450b-b522-ca6fd57d0db5/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=860,33

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/9a95265f-ad1c-4ce5-8b2e-a85e42d839e0/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=855,63

Warehousing Overview

Warehousing Module Description

The Warehouse Module is responsible for inventory management, including tracking stock levels, managing warehouse operations, and organizing the storage and distribution of goods. It's key for maintaining efficient inventory control and order fulfilment.

The warehouse structure in the ERP system consists of four distinct levels: Site, Warehouse, Area, and Location. Users can create multiple instances of each level, which can be linked to their appropriate parent. After setting up the structure and allocating stock, users have the capability to transfer stock between different sites, warehouses, areas, and locations. Furthermore, they can receive stock items along with their quantities into the various levels of the warehouse structure.

The users can make use of the inventory management system to create stock take requisitions to conduct a physical stock count and compare the quantities for the respective stock items, assemblies and products to the virtual quantities on the ERP system.

Warehousing Module Process Flow

data:image/png;base64,iVBORw0KGgoAAAANSUhEUgAABkAAAAMvCAYAAACKlhyPAAAAAXNS
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YT3x7SI0QVRmrNQYodFYAwAAAAAAAACAcrGrxk8aJD+Iqo53NVpqAAAAAEyBBQAAAGCjtNL4Q
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GHHCK77babLFu2LEyetG/fPkxaWCLDkh+NGzcOb7fns+e217A1PiyZYSM/WrRoEa49YvW2GPre
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Warehousing Sub Modules

- Warehousing

The warehousing sub module allows for the creation of the virtual representation of your physical warehousing structure. The sub module stored specific stock items, assemblies and products in certain and specified area types which act as feeder processes or data into manufacturing processes.

- Inventory Management

The inventory management sub module allows for the physical vs virtual stock count and the creation of stock take requisitions to update any stock discrepancies which storing a historical history of all previously created requisitions.

- Transfer History

The transfer history sub module displays a historical record of all transferred or received stock items, assemblies or products into the different sites, warehouses, areas or locations.

Warehousing

Overview Description:

The warehouse structure in the ERP system consists of four distinct levels: Site, Warehouse, Area, and Location. Users can create multiple instances of each level, which can be linked to their appropriate parent. After setting up the structure and allocating stock, users have the capability to transfer stock between different sites, warehouses, areas, and locations. Furthermore, they can receive stock items along with their quantities into the various levels of the warehouse structure.

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Definitions

Site

The site represents the physical address or location where your warehouse or warehouses are situated. It typically encompasses a broader geographical area and may include multiple buildings or facilities.

Warehouse

A warehouse refers to the actual physical building or structure where goods are stored. It is within the site and serves as the primary storage space for inventory items. Each warehouse can have its own unique characteristics and layout.

Area

An area within a warehouse serves as a designated section or zone dedicated to organizing and storing various types of inventories. These areas are categorized based on the specific type of items they hold, which may include finished goods, raw materials, sub-assemblies, scrap, and customer or supplier returns, among others.

The areas have the following pre-defined area types which are utilized to store specific types of stock inventory for different use cases:

- Raw Materials: Area for storing unprocessed materials that will be used in manufacturing.
- Finished Goods: Space designated for products that have completed the manufacturing process and are ready for sale.
- Quality Inspection: Zone where items are checked for quality assurance before they move to the next phase of production or shipping.
- Shipping and Receiving: Area dedicated to the arrival of incoming goods and the dispatch of outgoing orders.
- Sub-assembly Inventory: Section for storing partially assembled products that require further assembly before they become finished goods.
- Kitting Space: Where individual items are grouped, packaged, and supplied together as one unit, which is essential for assembly lines.
- Packaging: Area where products are packaged for storage or shipment, with materials like boxes, bubble wrap, and tape readily available.
- Scrap/Waste Disposal: Designated spot for the collection of unusable by-products or waste materials that are to be discarded or recycled.
- Tool Crib: Secure location where tools are stored and managed, often with check-in/check-out controls.
- Maintenance Area: Reserved for the upkeep and repair of machinery, equipment, and parts.
- Supplier Returns: Space allocated for storing items that are returned to suppliers due to defects, excess order, or other reasons.
- Customer Returns: Section for goods returned by customers that may be restocked, repaired, or processed in another manner.
- Special Storage: Area for items that require specific environmental conditions or security measures, such as high-value or hazardous materials.
- Temporary Storage: Flexible space used for short-term storage needs, often used for overflow or staging items for processing.
- Destroyed/Condemned: Area for goods that are marked to be destroyed due to irreparable damage or expiration.
- Repairs: Workspace for fixing damaged goods or equipment that can be returned to functional use.

Location

A location is the most detailed and specific storage designation within an area. It pinpoints the exact spot where an item is stored within the warehouse. Locations can be identified using various methods such as bin numbers, shelf numbers, or coordinates, and they help warehouse staff easily locate and retrieve items when needed.

Overview Video:

Warehousing.mp4

Walkthrough Documentation:

- Creating a Site

Step 1

Select the “Create Site” button as seen below:

Step 2

Enter in the following information to create the site:

  - Site Name
  - Site Street Address
  - Site State/Region
  - Site Country
  - Site Postal Code

-

Step 3

Once you have entered in the details of the site, you must select the “Create” button which will create the virtual representation of your physical site:

Once you have created the site, it will be populated on left site and is ready to create the sub warehouses, areas and locations which form part of the newly created site:

- Creating a Warehouse

You can create multiple warehouses from previously created sites by following the process below:

Step 1

Select the “dropdown” button next to any previously created site as seen below:

Step 2

Select the "+” button to create a warehouse under the specified site as seen below:

Step 3

Enter in the “Name” of the warehouse as seen below:

Step 4

Once you have entered in the warehouse name, you must select the “Create” button as seen below:

Once you have created the warehouse, it will be populated on left underneath the previously created site. You are now able to create areas within the created warehouse.

- Creating an Area

Step 1

Select the “dropdown” button next to any previously created warehouse as seen below:

Step 2

Select the "+” button to create an area under the specified warehouse as seen below:

Step 3

Enter in the following information to create the area:

  - Area Name
  - Area Description
  - Area Type
-

Step 4

Once you have entered in the relevant information, you must select the “Create” button as seen below:

Once you have created the area, it will be populated on the left underneath the previously created warehouse.

Once you have created the area type, you are able to start receiving or transferring stock to the newly created area.

Additionally, you are able to create locations within the area type.

- Creating a Location

Step 1

Select the “dropdown” button next to any previously created area as seen below:

Step 2

Select the "+” button to create a location under the specified area as seen below:

Step 3

Enter in the following information to create the location:

  - Location Name
  - Location Description
-

Step 4

Once you have entered in the relevant information, you must select the “Create” button as seen below:

Once you have created the location, it will be populated on the left underneath the previously created area.

Once you have created the location, you are able to start receiving or transferring stock to the newly created location.

- Transferring Stock

Step 1

Select the specific site, warehouse, area or location in which you would like to transfer stock from.

Step 2

Select the specific stock material which you would like to transfer to another site, warehouse, area or type location.

Enter the quantity of stock you would like to transfer by entering the numerical value as seen below and then select the “Transfer Stock” button.

Step 3

Select the specific site, warehouse, area and location in which you would like to transfer the stock to.

Enter in the “Reason for Transfer” in the text box and once completed, select the “Transfer” stock button.

Step 4

The stock quantities will be deducted from the original location and added to the destination location as seen below:

- Receiving Stock

Step 1

Select the “more options” button as seen below:

Step 2

Select the “Receive Stock” button as seen below:

Step 3

Select the specific Site, Warehouse, Area and Location in which you would like to receive stock into through the process seen below:

Step 4

Enter in the stock item code you would like to receive into the destination and select from the options presented in the drop-down list:

Step 5

Enter in the quantity of stock you wish to receive and complete the following optional information prior to adding stock:

- Serial Number
- Batch Number
- Manufacturer Serial Number
- Manufacturer Batch Number
- Expiry Date

Step 6

Select the “Add Stock” button to receive the stock into the destination:

The stock quantity will now be allocated to the destination as seen below:

Inventory Management

Overview Description:

The inventory management sub module is utilised to create stock take requisitions to conduct a physical stock count and compare the quantities for the respective stock items, assemblies and products to the virtual quantities on the ERP system.

Stock take requisitions can be created to record any stock discrepancies and update the virtual stock quantity balances to ensure the alignment of the physical stock quantities.

Inventory Management Process Flow:

Overview Video:

Inv Man.mp4

Walkthrough Documentation:

- Inventory Management

Step 1

Select the "Inventory Management" button to view the current stock levels and create stock take requisitions.

Step 2

The initial page will show you the current stock levels for all stock items for all warehouse sites and their associated warehouses, areas and locations.

You must select the appropriate Site, Warehouse and Area into which you would like to create a Stock Take Requisition for.

Step 3

The specific destination will be populated with the assigned stock items. Select the "Generate Stock Take Requisition" button to action the stock take.

Step 4

Specify if you would like to include serialization and batching for the Stock Take Requisition.

Select the "Confirm" button

Step 5

The Stock Take Requisition and been created and now you must select the "Stock Take Requisition" tab to view the pending requisitions.

Step 6

Select the specific Stock Date Code you would like to complete:

Step 7

Select the edit button next to each item code to enter in the correct stock values:

Step 8

Select the "Submit Requisition" button to submit the updated quantities.

The stock take requisition will now be completed and then stock values will be updated in the specified location.

Transfer History

Overview Description:

The Transfer History sub-module meticulously records the entire history of stock transfers within the system. These stock transfers encompass movements between various sites, warehouses, areas, or specific locations within the organizational framework. Additionally, any stock received from suppliers and subsequently transferred from the receivable holding area to a designated warehouse is comprehensively documented within this module. This thorough record-keeping mechanism ensures transparency and accountability in the inventory management process, providing a detailed trail of stock movements for analytical purposes and operational insights.

Overview Video:

Transfer History.mp4

Walkthrough Documentation:

- Transfer History

Step 1

Select the “Transfer History” button to view a history of all the stock and associated data transferred or received into a specific warehouse destination:

Step 2

A full history of all receipts and transfers will be populated with the stock items associated code, version, type, manufacturing batch number, manufacturing serial number, internal batch number, internal serial number, quantity, the warehouse it was transferred from and the destination warehouse along with the data in which the transfer or receipt occurred.

\Procurement Overview

Procurement Module Description

This module is dedicated to the acquisition of goods and services, encompassing the management of supplier relationships, purchase orders, inventory levels, goods receiving, and invoice processing. It plays a vital role in ensuring that a business maintains the necessary materials and resources to sustain its operations.

The procurement module facilitates the creation and oversight of suppliers, subcontractors, and manufacturers involved in the procurement process of ordered items. Users can generate material orders to maintain accurate inventory levels for minimum stock requirements, demand forecasting, or to fulfill production plans.

Furthermore, the module enables the tracking and management of order plans through the creation and administration of RFQs (Request for Quotation) and Purchase Orders. Additionally, it provides functionality for managing received stock, including the creation of Goods Received Notes and the allocation of ordered items to specific warehouses.

Procurement Module Process Flow

Procurement Sub Modules

- Create Material Order

The Create Material Order sub-module enables the development of order plans for purchasing items from suppliers. You can create material order plans based on various criteria, such as Order to Stock, ArcAI recommendations, Replenish Minimum Stock levels, or the requirements of a production order.

- Manage Order

The Manage Orders sub-module streamlines the administration of created order plans. It allows you to track progress, generate and manage RFQs and Purchase Orders, and oversee the receipt of ordered items, ensuring they are assigned to specific warehouses as needed.

- Vendors/Manufacturers

The Vendors/Manufacturers sub-module provides comprehensive tools for creating and managing your network of suppliers, subcontractors, and manufacturers. This module allows you to maintain detailed profiles for each vendor, including contact information, products or services offered, and historical performance data.

- Dashboard

The Procurement Dashboard in the ArcFlow ERP system is a comprehensive management tool that provides a detailed overview of your procurement activities. It tracks key metrics such as procurement volume, supplier performance, and open and pending order plans.

Create Material Order

Overview Description:

The Create Material Order Plan functionality enables the development of order plans for a list of items and their respective quantities. These order plans are essential for ensuring stock availability for inventory management or production purposes. Once created, order plans serve as the basis for generating RFQs (Requests for Quotations) and, subsequently, Purchase Orders.

Order Plan Creation Types:

The system supports four different type of materials order plan creation methodologies listed below:

Order to Stock

Order to Stock involves manually creating an order plan for maintaining stock levels. This process allows you to select items, assemblies, and products. If you choose an assembly or product, the system will automatically decompose the Bill of Materials (BOM) structure into its individual components.

ArcAI

ArcAI generates a list of items and their respective quantities to be included in an order plan. The system leverages multiple data inputs, such as demand, minimum stock holding, delivery duration, and over 40 additional data sets, to provide these suggestions.

Production Plan

During the production plan creation phase, the production manager can notify the procurement department to create a procurement order plan to meet the production plan's requirements for the necessary stock of assemblies and products. This allows for the direct creation of an order plan based on the specific needs of the production order.

Replenish Minimum Stock

The Replenish Minimum Stock functionality notifies you when an order plan needs to be created to maintain the minimum stock levels for items. The system suggests quantities to order based on the difference between the current stock levels and the established minimum stock quantity.

Overview Video:

Create Material order.mp4

Walkthrough Documentation:

- Order to Stock

Step 1: Select "Create Material Order"

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Step 2: Select the "Order to Stock" tab.

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Step 3: Select the item, assemblies or products you wish to order.

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!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ab4e4e7c-b4a4-4c0d-95e6-985844aa142a/ascreenshot.jpeg?tl_px=1736,629&br_px=3456,1590&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=951,277

Step 5: Enter the quantities of each item you wish to order.

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!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/0b34dd92-39cd-46f4-9655-8a593de0eff6/ascreenshot.jpeg?tl_px=1736,317&br_px=3456,1278&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=848,276

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Step 6: Select the "Create Order Plan" button.

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- ArcAI

Step 1: Select "Create Material Order"

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Step 2: Select "Arc AI"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/12e4f646-0b4d-43d8-bb20-16c1dd134504/ascreenshot.jpeg?tl_px=0,25&br_px=1719,986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=372,277

Step 3: A global list of suggested items and their associated quantities are listed in the table. You are able to utilise the "Months" functionality to alter the forecasted timeline in which you would like to receive output suggestions.

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!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b69659df-ae71-4f97-97f1-db38b7bc7443/ascreenshot.jpeg?tl_px=1736,327&br_px=3456,1288&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=875,276

Step 4: You are able to utilise the supplier icon to view the suggested suppliers based on their KPI records of supplying the item.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/09e0fefd-6bd8-4d5f-bee1-3d001e88fa86/ascreenshot.jpeg?tl_px=201,83&br_px=2494,1364&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/6a3cca9f-1231-4f0a-9a34-2c0fe1bbcce9/ascreenshot.jpeg?tl_px=201,83&br_px=2494,1364&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 5: You can alter the suggested quantity by select the editable quantity field.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b906d99b-e59b-4c6d-9427-4b9ddf5429eb/ascreenshot.jpeg?tl_px=1736,237&br_px=3456,1198&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=849,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b082b902-9c58-49cc-b489-c91863b9bbde/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=817,244

Step 6: Select "Create Order Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/483340e6-eb56-44f8-87f2-4b0ccb07c10e/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=839,174

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/c188a4db-8522-4423-bfdc-fd24e44d79fc/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1017,29

- Production Plans

Step 1: Select "Create Material Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/32680d2d-9e5b-4111-99d5-c4e715e2f6cb/ascreenshot.jpeg?tl_px=0,33&br_px=2293,1314&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=266,277

Step 2: Select "Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/ece81f85-8b25-4654-a319-4184e3ffc87b/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=396,208

Step 3: Utilise the "Production Plans" dropdown list to select the specific production plan you wish you create an order plan for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/41f96414-016c-4c7b-90fb-e5b6264f7a3b/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=969,208

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/64e1d34d-b175-4508-b266-f5f00b2524bc/ascreenshot.jpeg?tl_px=1736,289&br_px=3456,1250&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=826,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/e2711a95-9503-4df8-af72-9bc8ffeedd67/ascreenshot.jpeg?tl_px=1736,129&br_px=3456,1090&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1001,277

Step 4: The production plan will be populated and you can use the drop down list to view the required contents.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/9b877089-8bac-4848-beee-42178a65ba82/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=55,197

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/df7d6c2d-bde3-42d9-b54a-6eb983f6ee67/ascreenshot.jpeg?tl_px=0,235&br_px=1719,1196&force_format=png&width=112

0.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=146,276

Step 5: Select "Create Order Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/d7be477d-46a4-4087-89c0-f720454ac2c5/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=826,176

Step 6: You now need to specify whether you would like to create the order plan either including or excluding minimum stock quantity.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/65fad11e-98f2-439f-a239-8cd72ef14d71/ascreenshot.jpeg?tl_px=155,477&br_px=2448,1758&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 7: Select "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/d8f4c368-e2d8-470d-889a-78d0e0ce3818/ascreenshot.jpeg?tl_px=725,567&br_px=3018,1848&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

- Replenish Minimum Stock

Manage Orders

Overview Description:

The “Manage Orders” Sub Module serves as a comprehensive platform for creating and overseeing the entire life cycle of material order plans within the procurement process. Beginning with the initiation of quotes, this module empowers users to create purchase orders seamlessly, ensuring the procurement of necessary goods or services. As the ordered stock items are received, the module facilitates their efficient allocation, streamlining the process of replenishing inventory and optimizing warehouse management.

Definitions

Order Plan

An order plan is a comprehensive framework that consolidates ordered items, quantities, and linked suppliers, serving as the backbone of the procurement process. It facilitates the creation of quotes and purchase orders, streamlining procurement workflows and ensuring precise inventory management.

RFQ

A quote serves as a formal request sent to suppliers to assess pricing, availability, and delivery timelines for specific goods or services. It enables organizations to gather essential information from multiple suppliers before making a procurement decision. With the ability to create multiple quotes for the same ordered items from different suppliers, organizations can compare offers and negotiate terms to secure the most favorable deal. Additionally, the option to skip the quote stage and proceed directly to creating a purchase order based on existing order plans streamlines the procurement process, expediting the acquisition of needed items or services.

Purchase Order

A purchase order is a formal document issued by a buyer to a supplier, specifying the details of the goods or services to be purchased. It outlines the quantity, price, delivery terms, and other relevant information agreed upon between the buyer and the supplier. A purchase order serves as a legally binding contract between the buyer and the supplier, confirming the agreement reached during the procurement process.

Receivables and Goods Received Notes

A Goods Received Note (GRN) is a formal document acknowledging the receipt of items ordered as part of a purchase order. Multiple GRNs can be generated for a single purchase order. Upon creation of GRNs, the received stock is initially stored in the receivables area before being allocated to specific warehouses for storage, thereby updating inventory levels accordingly.

Process Flow:

Overview Video:

Manage_Orders_Final.mp4

Walkthrough Documentation:

- Order Plans

Step 1: Select the "Manage Orders" Sub Module

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d62dd262-162e-4ea7-8221-ec81eead20c4/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=412,179

Step 2: Select "Order Plans" which will list all of the created order plans and their progress based on RFQ and Purchase Order Progress.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/9933abe8-4777-4515-ba7b-404f12918597/ascreenshot.jpeg?tl_px=0,55&br_px=2293,1336&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=273,277

Step 3: Select an Order Plan you wish to assess.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/fa447cc4-b005-48a6-a5bf-6d358a94a1d4/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=133,251

Step 4: You will view the items which are part of the order plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/2e7fc082-d1e7-4026-8c68-7410d5d40afd/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=94,272

Step 5: Select the items you wish to create an RFQ for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/df9edba8-0941-4aa9-833a-dbf87f3ec9d1/ascreenshot.jpeg?tl_px=0,577&br_px=1719,1538&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=223,277

Step 6: Select the "Create RFQ" button which will send out automated RFQ's for the suppliers linked to the item. You can view the suppliers by selecting the information icon next to each item under the "Suppliers" column.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/af0e302e-721b-49e1-972b-357cfe066e86/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=935,242

Step 7: You need to confirm the RFQ creation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/0159e717-919e-43c9-83cd-fda8df9bfd64/ascreenshot.jpeg?tl_px=1092,673&br_px=2812,1634&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

The RFQ's have been created.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ce0333da-71a5-49cd-be15-0b65c5600373/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1035,14

You can view the created RFQ's by going back to the order plan management page.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d4e93078-24f7-41f6-8bddaa0e270ea55e/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=317,25

Select the "View" icon next to the RFQ Progress bar.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/af2f6b20-0db9-4a1e-a48b-5fd2fec1ceca/ascreenshot.jpeg?tl_px=1468,413&br_px=3188,1374&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

A list of the single or multiple RFQ's will be displayed here based on the number of items and potential of multiple suppliers linked to the ordered items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/046bcf12-2c31-4a39-897f-571ff86b94ff/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=888,190

- RFQ’s

Step 1: Select the "RFQ" Feature.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/c80deb22-45fa-4421-a814-48d049c66165/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=428,188

Step 2: A list of all of the created RFQ's and their associated progress are listed in the table. You can select a specific RFQ to capture supplier feedback to create a "Purchase Order".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a7fd681d-836c-4138-b40c-3fe0649f1125/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=542,254

Step 3: Select "Capture RFQ"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/f96250e0-4e96-441f-86a8-448ccf300723/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=912,151

Step 4: Enter in the suppliers responses by completing the Order Quantity, Delivery Days and Unit Price.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/dc9f09d8-93ff-4707-accf-bbdf3320521d/ascreenshot.jpeg?tl_px=16,16&br_px=3456,1939&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=569,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/4c2a8de8-abb2-4182-b857-6c1f6211e97c/ascreenshot.jpeg?tl_px=1478,503&br_px=3198,1464&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a7fdd5e5-030e-45c5-a9f7-32cfd24c54a7/ascreenshot.jpeg?tl_px=1736,497&br_px=3456,1458&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=680,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/0e7c8eaa-622f-40ba-b4f1-c662862bf5db/ascreenshot.jpeg?tl_px=1736,497&br_px=3456,1458&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=680,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d52dc56f-d0a0-4dd2-9c29-c3daf1168686/ascreenshot.jpeg?tl_px=1736,281&br_px=3456,1242&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=556,277

Step 5: Select the "Save" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/bfaf4143-0cae-4963-99c4-f194415f7740/ascreenshot.jpeg?tl_px=1736,91&br_px=3456,1052&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=904,277

Step 6: Select the "Create PO" button to create the PO based on the accepted RFQ.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/28a0d52a-165b-4df8-810e-64855a61fc4d/ascreenshot.jpeg?tl_px=1736,89&br_px=3456,1050&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=931,277

Step 7: Select "Create PO" which will then automate the creation of the purchase order and commitment to the supplier.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/6d38666b-b13d-459e-91c9-fafb4d67f01f/ascreenshot.jpeg?tl_px=1124,653&br_px=2844,1614&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

- Managing RFQ’s using the Supplier Hotline System

Step 1: Select a specific order plan you wish to create an RFQ for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/48c4418f-a5a5-4f0c-8ae6-5b6fabf8ad2b/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=357,249

Step 2: Select the items you wish to send out an RFQ for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/e5d02b6b-5b2a-487b-ae8d-c469354cfc5a/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=92,274

Step 3: Select "Create RFQ"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/e1015fec-c328-4d52-a4c3-96964701b585/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=985,241

Step 4: Select create and then your supplier will receive an automated email with a link to the ArcFlow hotlink system.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/06f05809-9fd9-4af1-ad50-ddd3f0321b3a/ascreenshot.jpeg?tl_px=1098,681&br_px=2818,1642&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: Select the RFQ's part of the order plan to view the feedback from the suppliers.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/6b35efed-8664-4c6a-bafc-4cade2053471/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=716,255

Your suppliers will open the hotlink and can edit the available quantities, delivery days and unit price and submit theire response to you. You are able to view the submission for the RFQ.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/45265857-7b44-4e17-a037-579eb9504a43/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=491,140

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/3c18a296-ad0c-4726-8582-2059c8aa76bd/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=652,135

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/9efa7e72-9f94-478d-b548-50ecea8dce42/ascreenshot.jpeg?tl_px=1696,67&br_px=3416,1028&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/fb0e01a4-3595-4eb3-8d64-3ac2839461b1/ascreenshot.jpeg?tl_px=1162,7&br_px=3456,1288&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=645,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/863ffa01-623e-486f-b4e4-e6edc46db6d0/ascreenshot.jpeg?tl_px=866,303&br_px=2586,1264&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Once submitted, you can either accept or reject the offer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/84bfd180-4405-4200-ac4b-5982c5b1c6c6/ascreenshot.jpeg?tl_px=16,10&br_px=3456,1933&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1016,277

Once accepted, you can create a Purchase Order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/ec7f30fc-dd8a-4d59-8137-97bc1249795e/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=944,247

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/8c93413e-6a2d-404d-a15b-fa6b923f097b/ascreenshot.jpeg?tl_px=1098,643&br_px=2818,1604&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

- Purchase Orders

Step 1: Select the "Purchase Orders" Feature.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/00411e1f-c655-49c7-b063-83264c48f151/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1814&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=657,195

Step 2: Select a purchase order which has not received its full delivery.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/9ccd0825-5a0f-4b7b-9729-8690f7d3d954/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1810&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=456,393

Step 3: once inside the purchase order, select the "GRN" tab to generate the Goods Received Note for specific items which have been received.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/d5c6f4a8-0b5c-4e73-94f5-7f59ab5fe708/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1802&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=201,206

Step 4: Select "Create GRN"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/57e1fff3-fd77-4117-83f9-bc11972fab8c/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=992,229

Step 5: A table will be presented with all of the outstanding ordered items and their quantities. Enter in the quantity which has been received to generate the GRN.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/3ff3f42b-583d-42dc-8cc0-ce890e91eea5/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1798&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=787,121

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/7e3d1ba8-5ff2-40a9-a727-7f2d5a86cd05/ascreenshot.jpeg?tl_px=1676,91&br_px=3396,1052&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Select the "Save" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/53f76064-d6f2-4018-9c58-10aec816eec7/ascreenshot.jpeg?tl_px=919,704&br_px=3212,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,448

Step 6: The GRN has now been created and you are able to transfer the ordered items to be processed at the receivables area. Select the "Transfer" button. The receivables area is the place in which you assign the stock into the selected warehouse.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/9a7e95aa-3c3f-43d5-91df-ef486fd49c95/ascreenshot.jpeg?tl_px=1162,423&br_px=3456,1704&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=943,277

Step 7: Select the "Yes, Transfer" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/138b8a4b-713a-4bbf-9dba-738bd051e296/ascreenshot.jpeg?tl_px=873,511&br_px=3166,1792&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

The GRN has now been processed and the ordered items can be found within the "Receivables" feature.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/a7d50b83-2ed5-40af-a155-0a72a659edb0/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1018,26

- Receiving Area

Step 1: Select the "Receiving Area" feature.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/43e03eae-4d39-4afe-a56c-e234960dc388/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1809&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=915,188

Step 2: Expand the PO you wish to view and assign.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/d7a496e9-63c0-4319-b82e-d49e48e1af26/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=53,253

Step 3: Select the "Assign Items" button to assign the items from the purchase order to the relevant warehouse area type or location.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/d21ae47e-7e8e-4b51-9bac-9f09a8ef83b5/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1814&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1022,251

Step 4: View the remaining number of items that still need to be received and then enter the quantity of the remaining, either in full or partial, you wish to assign to a warehouse area or location.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/a8616c17-0aa1-4863-b7f9-44bceff1665e/ascreenshot.jpeg?tl_px=255,0&br_px=2548,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,204

Step 5: Select the site, warehouse, area and location you wish to allocate the items to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/426c30db-1e33-474f-bab1-3d9d6066566e/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=655,348

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/1fa323c6-d9b1-4e16-a3df-ac10c83ec8e1/ascreenshot.jpeg?tl_px=1280,747&br_px=3000,1708&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

You must ensure that you are allocating the correct received items to the correct area type.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/a6fd4a5d-7b67-4619-9752-

77490a1941db/ascreenshot.jpeg?tl_px=908,847&br_px=2628,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 7: Select the "Assign" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/e8c263f6-dece-408a-9e5e-f27e28ba1990/ascreenshot.jpeg?tl_px=1046,1024&br_px=2766,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,386

Step 8: Select the "Assigned" button to view all the ordered items which have been assigned to a site, warehouse, area and location.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/c836d42a-c2f0-46af-98bb-5cfff1bab600/ascreenshot.jpeg?tl_px=0,197&br_px=1719,1158&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=405,276

Vendors/Manufacturers

Overview Description:

The “Vendor/Manufacturer” Sub Module is for the management and creation of suppliers, sub contractors and manufacturers. Each type has their own purpose on the ArcFlow system and feeds into different processes.

Definitions:

Suppliers

Suppliers are entities from whom you can purchase goods and services directly. They provide the materials, components, or products required for your production processes or business operations. The system allows you to manage and track your orders, deliveries, and payments with these suppliers, ensuring you have the necessary resources to meet your business needs.

Sub Contractors

Sub Contractors are specialized service providers that you can engage to perform specific tasks or processes as part of your overall production or project execution. Unlike suppliers who provide goods, sub contractors offer services such as assembly, installation, or maintenance. The ERP system helps you manage contracts, monitor the progress of subcontracted work, and ensure timely completion and quality standards.

Manufacturers

Manufacturers are entities that produce items that you may need for your operations. While you cannot place orders directly with manufacturers through the ERP system, you can link them to your items for tracking purposes. This linkage allows you to monitor the origin of your goods, ensuring traceability and quality control. By tracking manufacturers, you can also manage information about the production capabilities and certifications of the entities that produce your critical items.

Ordering Type Definitions:

The ArcFlow system allows for three separate ordering methodologies which are automated through the system. When you create a supplier or sub contractor, you need to select the ordering type. Please find the descriptions below:

Supplier System The Supplier System method involves sending the RFQ directly to the supplier's procurement or ERP system through established electronic data interchange (EDI) or other integration means. This process allows seamless communication and data exchange between your ERP system and the supplier's system. The supplier receives the RFQ in their system, processes it, and sends a response back to your ERP system. This method is efficient, reduces manual entry errors, and ensures faster processing.

In-House Capture In-House Capture involves preparing the RFQ within your ERP system and manually communicating it to the supplier. After generating the RFQ, it can be exported to a digital format or printed and then sent via email or mail to the supplier. The supplier sends their quotation back via email, mail, or fax, and it is manually entered into your ERP system. This method is simple and suitable for suppliers without sophisticated systems, but it requires more manual handling.

ArcFlow Hotlink System The ArcFlow Hotlink System utilizes a specialized platform to manage the sending and receiving of RFQs. After generating the RFQ within your ERP system, it is transmitted to the supplier through the ArcFlow platform. The supplier processes the RFQ and responds via the same platform, with the response then integrated back into your ERP system. This method centralizes communication and tracking, streamlining the procurement process and reducing manual errors.

Supplier and Subcontractor KPI Metrics:

Supplier Item KPI Metrics

Once you have created a supplier or subcontractor and have conduced multiple purchase orders for the items supplied by the supplier or subcontractor each item will have a KPI rating. The KPI rating is the performance rating for the specific item supplied by the supplier or subcontractor. The rating is based on multiple input metrics such as quality, costing, delivery times and stock availability etc. When creating a order plan, the system will present you with multiple suppliers or subcontractors tied to the specific ordered items and based on their KPI rating for the item, you are able to select the suitable supplier to send out an RFQ to.

Supplier KPI Metrics

The supplier KPI metrics tab will be presented once you have created a supplier or subcontractor and have run through multiple purchase orders. Our system will present an analytics tab found under “Supplier KPI Metrics” when viewing a supplier and subcontractor. The analytics will present metrics on Delivery Score, Quality Score, Quantity Score, Costing

Score, Responsiveness Score and Present a supplier confidence interval to suggest the overall confidence for the supplier.

Overview Video:

https://www.loom.com/share/b00acd00d3164827995eafdb78f4f3b6

Walkthrough Documentation:

- Create Supplier

Step 1: Select "Vendors/Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/d27024c0-3637-4cc4-9fcd-72a478b019e2/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=663,171

Step 2: Select "Create Supplier"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/d9b14fbd-995d-4a41-a5e3-f8575b86d9fd/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=966,60

Step 3: Enter in the suppliers general information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/33f28462-e518-491c-ae86-4476cc2ed398/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=399,271

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/d53ee9af-3e2c-4b8d-b4f3-e092b7a2c064/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=621,167

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/590f26ee-de9a-41f8-93c0-2ad18d7f544f/ascreenshot.jpeg?tl_px=0,259&br_px=1719,1220&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=486,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/9e38e84b-e7e2-45b4-9305-bcb035c7fca0/ascreenshot.jpeg?tl_px=0,339&br_px=1719,1300&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=468,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/19ec421f-421c-412c-9d68-9e473e3a3e9e/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=584,200

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/6c414ac6-1c57-4cac-b043-bbb17bc2ed9a/ascreenshot.jpeg?tl_px=1028,507&br_px=2748,1468&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/90c1536a-a78b-4de2-bd55-49bc7c008456/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=337,234

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/b077e3ed-5aeb-4c25-9dbc-181d40793ee1/ascreenshot.jpeg?tl_px=63,289&br_px=2356,1570&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Since you select supplier registered address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/a93440fb-7fd9-40ab-b32b-9a404eb18156/ascreenshot.jpeg?tl_px=82,587&br_px=1801,1548&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/8f9f157b-08c2-45c4-8508-3f79ae53c9f5/ascreenshot.jpeg?tl_px=0,623&br_px=2293,1904&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=329,277

Step 5: Add the suppliers primary contact details. These details are not the recipient of the automated RFQ and Purchase Order contact details.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/31689c4a-31e9-4c06-b35e-f38e02067497/ascreenshot.jpeg?tl_px=0,704&br_px=2293,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=225,423

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/8b5e69a6-1c52-4e9d-ae02-f7cbecbcad9e/ascreenshot.jpeg?tl_px=0,1024&br_px=1719,1986&force_format=png&width=11

20.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=315,343

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/7ceac07e-6f52-4d8a-8924-ab01b1f76a17/ascreenshot.jpeg?tl_px=1072,1024&br_px=2792,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,397

Step 6: Click "Orders & Finances"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/9824ae82-8a81-4f89-89ee-b71792384244/ascreenshot.jpeg?tl_px=66,0&br_px=1785,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,266

Select the ordering process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/ca3ea003-d2b1-4638-9906-b256b4880cd6/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=233,204

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/bf81fb38-5074-40cd-9970-dfb3c3e7035b/ascreenshot.jpeg?tl_px=0,405&br_px=1719,1366&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=468,277

Click "Delivery Type"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/50ad5a3e-1dab-48fd-8075-958b6e8f7916/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=591,247

Click Collection or Delivery.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/34ef201c-4038-45c6-a386-dafcc2ee20a3/ascreenshot.jpeg?tl_px=1078,475&br_px=2798,1436&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Since you selected collection in this example, enter the suppliers shipping address where you will collect the stock.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/4483fe3a-1d0c-4cd0-8463-b07e8dd3dae8/ascreenshot.jpeg?tl_px=0,583&br_px=1719,1544&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=379,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/87e45b2e-09c1-4f58-bf64-a359f49f183e/ascreenshot.jpeg?tl_px=0,783&br_px=1719,1744&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=340,276

Step 7: Enter in the email address in which you wish to send the automated RFQ and Purchase Order to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/9a498d29-90f8-46c2-b1d7-9c668ecc3980/ascreenshot.jpeg?tl_px=0,367&br_px=1719,1328&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=423,276

Step 8: Enter in the suppliers Billing Address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/4afb6a25-a3ea-485a-b91b-b38fcf2a7667/ascreenshot.jpeg?tl_px=0,631&br_px=2293,1912&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=265,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/80a12300-90f7-4673-9d50-799b32434f4f/ascreenshot.jpeg?tl_px=0,704&br_px=2293,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=258,328

Click "Documents" to add any documentation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/b8234d2a-bf1e-4b7a-997a-9de39b5820b2/ascreenshot.jpeg?tl_px=572,0&br_px=2292,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,263

Click "Create Supplier" to create the supplier.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/514df210-9807-43c7-afe9-b21fec79b19b/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=873,156

- View/Edit Supplier and Key Performance Indicators

Step 1: Select "Vendors/Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/2d212d58-fe0f-464e-b6dc-8d135cb7d7ad/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=659,173

Step 2: You will be presented with a global list of all previously created suppliers. You must select the specific supplier you wish to view or edit.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/2fc90206-b4c9-489a-9b5a-28906eb62c06/ascreenshot.jpeg?tl_px=0,36&br_px=3439,1959&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=338,277

Step 3: You are able to edit information and move through all the tabs for editing or viewing purposes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/373753e5-8370-4e59-a140-542aa73c0f99/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=387,235

Click "Orders & Finances"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/135d71cd-7d9a-4369-b171-3954fc3f3491/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=331,187

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/48fecd01-46b7-4fff-942c-b0a3f280bd15/ascreenshot.jpeg?tl_px=0,83&br_px=2293,1364&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=426,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/a97297c2-3631-4c2f-a923-52722df29a12/ascreenshot.jpeg?tl_px=0,173&br_px=2293,1454&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,277

The items tab will show the items in which the supplier supplies, their conversation quantities and KPI ratings per item supplied.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/395fe8ea-8691-4961-b314-

9b2f386f2a2b/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=495,191

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/6f5a46f0-a7b5-4aee-8934-0d0942fccf29/ascreenshot.jpeg?tl_px=38,265&br_px=1757,1226&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/b5c54a72-c1bc-43eb-bdd8-7c70e2b94e99/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=397,116

Step 4: Select "Save Changes"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/1e0a7a2d-e7ca-40fe-bbf0-a89d73cb973f/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=985,272

- Create Sub Contractor

Step 1: Select "Vendors/Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/1cfae8e9-9cb5-4ba7-86d1-6212c6c48a7c/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=656,177

Step 2: Select "Subcontractors"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/651691a5-412b-4d06-aaea-f039a15dc1b1/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=344,180

Step 3: Select "Create Subcontractor"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/d723d94a-410b-4506-83df-4aa9abc46c02/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=796,159

Step 4: Enter the general information for the subcontractor. You enter the name, code, status, group, tax ID and website url.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/452a33c1-b4b7-4d4f-b364-5e724e025985/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=204,165

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/1e18a263-a62f-4485-8046-fa6d50e8fa19/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=593,163

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/2c632cc6-b0c7-4520-8e92-8f1c9c709ba0/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=228,197

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/57230776-8ff9-408b-968d-a3d97b1800ba/ascreenshot.jpeg?tl_px=0,339&br_px=1719,1300&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=431,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/3efee240-c99e-4d1b-8510-97b9c86b8f3b/ascreenshot.jpeg?tl_px=863,99&br_px=3156,1380&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/5d68c9da-d90c-4b24-bf03-4f0c5f3827ee/ascreenshot.jpeg?tl_px=1028,595&br_px=2748,1556&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/f3a746b4-9b3c-47a9-b44c-8ba277c4a5c2/ascreenshot.jpeg?tl_px=0,14&br_px=3439,1937&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=475,277

Step 4: Use the search functionality to load the customer shipping address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/02814d40-469c-4e06-9594-5faf4f4526f7/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=167,286

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/16737937-976e-4d1c-a606-125830b4485e/ascreenshot.jpeg?tl_px=0,605&br_px=2293,1886&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=250,277

Step 5: Add the sub contractor primary contact details. These are the details for contacting purposes and not linked to the ordering process recipient.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/96a8a67d-3b67-4833-b0d0-3b6b8ef31a68/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=120,478

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/52ae9435-c230-4a5c-904c-607e1d66b1fc/ascreenshot.jpeg?tl_px=0,704&br_px=2293,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=211,396

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/a6150695-071e-4625-b3ad-2fffb2486d96/ascreenshot.jpeg?tl_px=787,704&br_px=3080,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,451

Step 6: Select "Order and Finances"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/e90340da-dad2-4c07-b30c-60db77dcbbcd/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=436,168

Step 7: Select the ordering process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/5273d86f-8394-4e49-b07b-918d233a53a3/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=275,201

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/e50c0d4b-3d54-4a67-a800-1ca1697059aa/ascreenshot.jpeg?tl_px=0,479&br_px=1719,1440&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=484,276

Step 8: Select whether the subcontractor provides for delivery.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/cce75e89-e69c-4a1e-9f36-

7fdd036da244/ascreenshot.jpeg?tl_px=1090,385&br_px=2810,1346&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/c5be5b8b-15c4-435e-83f3-fe87a601a5c3/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=589,277

Click "Supplier Currency"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/5cea5f8b-d4f2-40af-a4f8-ba45d4621ee7/ascreenshot.jpeg?tl_px=829,397&br_px=3122,1678&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/0031abde-7eaf-4b41-b13e-1390cd0e771e/ascreenshot.jpeg?tl_px=1072,779&br_px=2792,1740&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Click "Payment Type"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/a85acb97-2940-47cf-aa38-dbf540e31d37/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=428,309

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/fa205f8a-e2f8-4d0c-9a81-2ab458c077ca/ascreenshot.jpeg?tl_px=119,585&br_px=2412,1866&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 9: Enter the subcontractors Billing Address

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/67958365-2d25-480a-b8cf-e12814c0e562/ascreenshot.jpeg?tl_px=120,783&br_px=1840,1744&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/f5c9de82-9bd4-4078-af09-1a8849666317/ascreenshot.jpeg?tl_px=0,963&br_px=1719,1924&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=468,277

Step 10: Enter in the email address linked to the PO.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/2652b0d0-47c3-497f-9d65-f5551512fffa/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=589,526

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/1e28f143-f9d0-45b4-a3fd-317abd2542b4/ascreenshot.jpeg?tl_px=37,704&br_px=2330,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,458

Click "Documents"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/4d992a8d-fbfc-4464-a040-99cf3cfd9918/ascreenshot.jpeg?tl_px=319,0&br_px=2612,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,179

Step 10: Select "Create Subcontractor". You can now utilise the subcontractor during sub contracted routes.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/99f55d53-b6f2-4b09-9eea-95c7051e265a/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=793,161

- View/Edit Sub Contractor and Key Performance Indicators

Step 1: Select "Vendors/Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/ea919833-2865-4fc1-a579-f85bc3214831/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=654,179

Step 2: Select Subcontractors

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/25a66c40-453c-4133-84e6-4ffc77c4da42/ascreenshot.jpeg?tl_px=0,0&br_px=1719,961&force_format=png&width=1120.0

&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=457,251

Step 3: Select the specific subcontractor you wish to view or edit.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/2ccb6bed-073a-4625-9507-56e6f00aed7e/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=289,326

Step 4: You can now move throughout the different tabs to view and edit the information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/60b3001b-a74c-40ea-9514-ff4132e152af/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=210,117

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/e19a3efd-7753-463d-9c13-e46bfface9f9/ascreenshot.jpeg?tl_px=0,103&br_px=2293,1384&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=358,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/aab44406-bb11-42f0-a33a-19d7aaf3228a/ascreenshot.jpeg?tl_px=0,189&br_px=2293,1470&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=346,277

Step 5: Click "Save Changes" once you have completed editing.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/88089501-4ed0-47df-9b0e-3d33e5484469/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=998,110

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-05/551e71ed-dba8-43b6-9b91-f93a64452222/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1016,34

- Create Manufacturer

Step 1: Select "Vendors/Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/57395ad2-919c-46d1-b96d-98a8a5ec13a5/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1798&force_format=pn

g&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=909,173

Step 2: Select "Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7f423048-4829-412b-9591-8c3a17eb904e/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=516,179

Step 3: Select the "Create Manufacturer" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/00a755db-45e4-434f-8fcb-ea2ba191bc16/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=873,111

Step 4: Complete the manufacturers general information which starts with entering the manufacturers name.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/8402e28b-9119-4cf0-b913-c6371055fdf9/ascreenshot.jpeg?tl_px=0,115&br_px=2293,1396&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=359,277

Create the code which represents the manufacturer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/77d875a2-f0cc-4fb8-ab4c-217905bacd1d/ascreenshot.jpeg?tl_px=931,115&br_px=3224,1396&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Select the group of the manufacturer in order to categorise them using the pre defined list of categorises from the drop down list.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/2f8e7146-8600-4d63-ac3f-4b47c396bf67/ascreenshot.jpeg?tl_px=0,211&br_px=2293,1492&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=400,277

You also have the ability to create your own custom groups.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7ef080fa-c364-4f7e-9b75-1b6c33db1c76/ascreenshot.jpeg?tl_px=0,487&br_px=2293,1768&force_format=png&width=11

20.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=356,276

Search from the street address of the manufacturer and our system will auto populate the fields on your behalf.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/d664f8fb-4a81-4202-ac44-e49726cd576a/ascreenshot.jpeg?tl_px=0,453&br_px=2293,1734&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=361,277

Step 5: Select the "Contacts" tab to enter in a single or multiple contact details of the manufacturer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/2988c906-f081-4d70-9bd8-032d0a82c13e/ascreenshot.jpeg?tl_px=0,0&br_px=1719,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=408,260

Select the "Add Another Contact Button"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/95de1bc3-47c3-4c6e-93d5-4d3cedd557ca/ascreenshot.jpeg?tl_px=0,281&br_px=1719,1242&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=318,277

Enter in the contacts name, role, phone number and email address.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/f6e7e125-ea63-4302-810c-7f5c1d8c560d/ascreenshot.jpeg?tl_px=0,191&br_px=2293,1472&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=213,277

Step 6: Select the "Documents" tab to upload any relevant documentation in which you wish to capture against the manufacturer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/97044dc0-2575-42f5-90fe-4ca12eb2a7cf/ascreenshot.jpeg?tl_px=38,0&br_px=1757,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,260

Step 7: Upon completion of the three tabs or by entering in the minimal required information. You can select the "Create Manufacturer" button. This will create the manufacturer and allow you to link the manufacturer to already loaded items through the Blueprint module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/6f624f90-2b84-43d2-9e47-c6057cb9ec96/ascreenshot.jpeg?tl_px=0,109&br_px=1719,1070&force_format=png&width=11

20.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=316,277

- View/Edit Manufacturer

Step 1: Select the "Vendors/Manufacturers" Sub Module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/5dc9c179-a6b0-41ff-8d63-95aaee309ae6/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1810&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=911,177

Step 2: Select a previously created manufacturer.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/7ff24732-07aa-4229-a395-666ebefbd852/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1814&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=495,226

Step 3: View the general information tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/c6986974-26e2-4968-92d5-8d9cae1a3c3a/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=281,178

Step 4: View the contact list and uploaded documents.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/90e59d3a-413d-4a18-850b-15c4f02e9c29/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=400,178

Dashboard

Overview Description:

The Procurement Dashboard on the ArcFlow system offers a comprehensive overview of your procurement activities through detailed metrics and visualizations. It tracks key metrics such as procurement volume categorized by paid, pending, and settled invoices. The dashboard includes dynamic charts and graphs that illustrate procurement volume trends over time, as well as detailed breakdowns of procurement by item and by supplier. This intuitive visualisation aids in monitoring spending patterns, identifying top suppliers, and managing invoice statuses, thereby enhancing your overall procurement efficiency and decision-making process.

Overview Video:

Procurement Dashboard.mp4

Walkthrough Documentation:

- Dashboard Walkthrough

Step 1: Select the "Dashboard" Sub Module

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/50c99b01-7c61-4885-a03c-4eba50a9c0e6/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=841,269

You are able to filter between different date ranges associated with each chart on the dashboard.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/be50bb4b-60b3-4390-946a-939a3eb61dea/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=867,32

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/7b8ed18e-38b4-4399-9a51-ac5f7c34376a/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=919,33

Manufacturing Overview

Manufacturing Module Description

The manufacturing module enables the setup of your production facility by establishing production lines and workstations.

You can create production plans that are scheduled using work orders. Job cards can be generated and assigned to employees, who will receive tasks based on the linked processes of the assemblies' and products' routes.

This module streamlines manufacturing operations by allowing users to kit assemblies and final assemblies before production. Additionally, users can view and execute their daily tasks or processes derived from the scheduled production plans.

Manufacturing Sub Module Functionality Overview

Manufacturing Module Process Flow

Manufacturing Sub Modules

- Production Setup

The pre-production sub-module manages the initiation of production orders, which can originate from Sales Orders, Made to Stock requests, or ArcAI suggestions. It serves as the primary phase of the production workflow, where the generation of production orders initiates the subsequent processing stages within the production sub-module.

- Pre Production

The production sub-module streamlines the oversight of generated production orders. Initially, scheduling production orders is executed through works orders and job cards, supported by our capacity planning feature. Additionally, the production sub-module provides a live overview of scheduled production orders, along with their associated assemblies and products, as they progress through production lines and linked workstations.

- Production Operations

The post-production sub-module facilitates the handling of finished products requiring packing and dispatch, destined for either warehouse storage or customer delivery.

- Production Overview

The production history sub module gives a historical view and management of all completed production orders.

- Dashboard

The manufacturing dashboard gives real time insight and decision making capabilities on the current production process and future production considerations.

Production Setup

Overview Description:

A production facility is the virtual representation of the physical space where manufacturing processes take place. It typically includes a production floor, equipped with machinery, tools, and workstations organized into production lines.

At its core, a production facility serves as the operational hub where raw materials are transformed into finished products or assemblies. It hosts various manufacturing processes, such as assembly, fabrication, machining, and quality control checks.

Production facilities comprise various production lines, each tailored to specific manufacturing processes. Within these production lines, there are multiple workstations, each designated for distinct tasks and operations. This hierarchical structure ensures that different stages of production are efficiently organized and managed.

Each workstation plays a critical role in the overall production line, contributing to the seamless flow of materials and assembly of products. By segmenting the production facility into specialized lines and workstations, the facility can optimize workflow, enhance productivity, and maintain high standards of quality control throughout the manufacturing process.

Production Setup Representation

Once you have setup your production facility, production line and workstations, the setup will create a virtual production facility environment. A visual example is found below:

Key Terms:

Workstation production capacity refers to the maximum number of concurrent processes that can be performed. For instance, if a workstation has a production capacity of 2, this could mean either one employee can handle two processes simultaneously, or it could mean two employees can work on a single process concurrently.

The production capacity directly relates to the number of employees working concurrently at a workstation or the number of processes that can be executed simultaneously.

Overview Video:

ProductionSetup.mp4

Walkthrough Documentation:

- Create a Production Facility

Step 1: Select the "Create Production Facility" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/7f2c5bc7-dd08-4165-8418-11d553ba1f27/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1811&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=921,55

Step 2: Enter the name of the production facility.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/e518c2fc-ae0e-4ce2-b9e1-7070337e1348/ascreenshot.jpeg?tl_px=419,277&br_px=2712,1558&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: Select the warehouse site that is associated with the production facility.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/3e7532fd-8ba7-47ba-8ba7-71b2de518aa9/ascreenshot.jpeg?tl_px=493,383&br_px=2786,1664&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Select the site from the dropdown list.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/2c5d4c0c-c342-4b20-82f3-e70b4aeb4446/ascreenshot.jpeg?tl_px=686,765&br_px=2406,1726&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 4: Select the associated warehouse which is linked to the site connected to the production facility.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/23a86b16-71d1-406c-88cb-cb52545fd8dd/ascreenshot.jpeg?tl_px=443,525&br_px=2736,1806&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

Select the warehouse from the dropdown list.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/c849046b-970d-47a8-9fb5-7fd508742c6f/ascreenshot.jpeg?tl_px=710,905&br_px=2430,1866&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: Select the "Confirm" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/669c86bd-d867-4b52-bea1-0a92f4662091/ascreenshot.jpeg?tl_px=759,704&br_px=3052,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,281

The production facility has now been created and you can filter to any created production facilities to action any Pre Production, Production and Post Production activities.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/4751c5d4-7160-438a-a603-85cffd3eeaa8/ascreenshot.jpeg?tl_px=90,0&br_px=1810,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,128

The production facilities will be seen in the drop down below.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/a7cec792-d59e-4f6e-8ab6-b973204c2047/ascreenshot.jpeg?tl_px=546,0&br_px=2266,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,129

- Create a Production Line

Step 1: Select the "Production Line" Sub Module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/986804df-bf6e-49e9-92f7-8dfb1e05002a/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=417,171

Step 2: Select the "Create Production Line" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/01df122e-b0ce-4ee6-a0b4-289048c27b7f/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=864,241

Step 3: Enter in the name of the production line.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/2d78c285-fefb-49b5-adb7-42930d5b1556/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=298,248

Step 4: Enter in the production line number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/127e9936-3e8a-43c5-b297-7d681323df0d/ascreenshot.jpeg?tl_px=891,0&br_px=3184,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,242

Step 5: Use the dropdown list to select the type of production line.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/e86b9bd2-d04a-4447-ae00-b22af8f2bec8/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=431,186

Their are two types of production lines, being Sub Assembly and Final Assembly Production Line.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/cd80d5ec-27f7-4fc2-8552-0dcebea1492f/ascreenshot.jpeg?tl_px=0,193&br_px=2293,1474&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=509,277

Step 6: Select "Add Production Line"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/f7b6c246-d707-4f7a-b8a2-d16abb582723/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=817,148

- Production Line Overview

Step 1: Select "Production Lines"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/dc828ed3-2ae5-4243-a4e7-c80ee075f887/ascreenshot.jpeg?tl_px=277,0&br_px=2570,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,273

Step 2: Utilise the drop down list to view the workstations linked to the production line.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/3beab337-5ae9-4b47-abb5-1f926588a378/ascreenshot.jpeg?tl_px=0,313&br_px=2293,1594&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=100,277

The linked workstations will be displayed in the dropdown table.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ec9aa16d-c64c-470a-8dcc-c9b01f67bca4/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=54,270

- Create Workstations

Step 1: Select "Workstations Overview"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/7f4975bb-ac81-4bbf-9c4b-eea40bcb4bbe/user_cropped_screenshot.jpeg?tl_px=16,0&br_px=3456,1809&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=667,169

Step 2: Select "Create Workstations"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/8f7428c1-adc1-452f-9388-f956eb6f3952/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=882,241

Step 3: Enter in the workstations general information starting with the name

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/00faa2f9-c27f-4b39-a906-ca00882b3508/ascreenshot.jpeg?tl_px=166,89&br_px=1886,1050&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Enter the description

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/903b608e-8ca8-4442-904b-84b20cdf8541/ascreenshot.jpeg?tl_px=1200,85&br_px=2920,1046&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

select the production line in which the workstation belongs to

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/24039c59-64ed-4d03-8916-3fa094fc19f3/ascreenshot.jpeg?tl_px=171,125&br_px=2464,1406&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Allocate possible employees to the workstation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/1c8b0cca-09b6-4b34-a06c-ac2e9a3041cb/ascreenshot.jpeg?tl_px=1736,325&br_px=3456,1286&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=995,277

Step 4: Enter the estimated hourly costing of the workstations starting with electricity

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/154b5c2c-b96c-44c8-b5f3-357db398042c/ascreenshot.jpeg?tl_px=152,401&br_px=1871,1362&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Then rental cost

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/7f972092-6ded-42d2-b9fa-

914f29e94b4f/ascreenshot.jpeg?tl_px=1140,439&br_px=2860,1400&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

and the estimated hourly wage rate of the employees which work at the workstation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/18b6eb5a-ee64-4f8f-9edb-85f2068fa713/ascreenshot.jpeg?tl_px=204,519&br_px=1923,1480&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: Enter the workstation daily operating start and end time for each week day.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/b71179ce-4fb8-4db8-83f1-66381fc5237b/ascreenshot.jpeg?tl_px=0,704&br_px=2293,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=342,338

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/b61974b1-b094-4905-9888-15838c183063/ascreenshot.jpeg?tl_px=39,1024&br_px=1759,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,488

Step 6: Enter the production capacity which is the total number of simultaneous processes which can happen.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/2468099d-e893-428c-a838-a2bbae92f5a2/ascreenshot.jpeg?tl_px=0,1024&br_px=1719,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=517,493

Step 7: Select the "Create workstation" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/27ab987d-f681-4a3e-9996-0304202da2da/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=813,159

- Workstation Overview

Step 1: Select "Workstations"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/512b1460-d0be-4627-beda-66fb7d1a2034/ascreenshot.jpeg?tl_px=0,183&br_px=1719,1144&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=376,277

Step 2: A global list of all of the created workstations will be shown. You are able to view the daily operations tied to the workstations or you can edit the workstations details by selecting a specific workstation.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/71e3641f-e360-4804-9b97-fadbf1de53d4/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=443,333

Step 3: The details, which could be edited, of the workstation will be shown.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/ca601a23-62ad-4785-a4e6-524c29799de5/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=335,27

Pre Production

Overview Description:

The Pre-Production module encompasses all workflows and activities that take place before the commencement of actual production. This module is designed to help you efficiently create detailed production plans and schedules, which are managed through the generation of work orders and job cards. By providing a structured approach to planning, the module ensures that all necessary preparations are in place before production begins.

In addition to planning and scheduling, the Pre-Production module offers robust tracking capabilities, allowing you to monitor the progress of your production plans in real-time. This feature enables you to oversee the status of each planned task, identify any potential delays or issues, and make necessary adjustments to keep the production process on track. Through its comprehensive planning and tracking functionalities, the Pre-Production module ensures that your production operations are well-coordinated and poised for success.

Definitions:

Create Production Plan Type

When creating a production plan you can utilise the four method listed below:

- Sales Order: You create a production plan based on sales orders generated by the sales department to fulfil a customer order.
- Make to Stock: You create a production plan for the purposes of increasing your stock holding for assemblies and products.

- ArcAI: The ArcFlow system suggests which assemblies and products and their associated quantities you should produce based on production forecasting.
- Able to Manufacture: The system alerts you on which assemblies and products you are able to manufacture based on your stock availability.

Production Plan

A production plan is developed from sales orders and made-to-stock requirements. It outlines the overall strategy and schedule for manufacturing products, specifying what needs to be produced, in what quantities, and by when, to meet customer demands and maintain optimal inventory levels.

Work Order

A work order is generated to execute the production plan. You can have multiple work orders linked to a production plan. It contains the schedule and the different assemblies and products and their associated quantities which need to be executed. Work orders guide the production process, ensuring that each step is carried out according to the plan.

Job Card

Job cards are created to schedule and manage work orders. You can create multiple job cards to fulfil a work order. They are assigned to employees and detail the specific tasks they need to perform as part of the assembly or product route. Job cards help in organizing the workflow, tracking progress, and ensuring that each task is completed efficiently and accurately.

Pre Production Overview Process Flow:

Walkthrough Documentation:

- Create Production Plan - Sales Orders

Step 1: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/66676143-ea5e-45bf-b43b-418fd100f29b/ascreenshot.jpeg?tl_px=0,89&br_px=2293,1370&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=300,277

Step 2: Select the sales order in which you want to create a production plan for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/632c872a-7170-4228-89ef-f885a05bdacd/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=94,196

Step 3: Select "Generate Production Scenario" to view an overview of the production scenario and stock availability.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b99de9c5-9eae-483c-969e-eb586770376f/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=806,67

Click "Yes"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/270b0b5f-fa42-4f94-b468-808cd490f04c/ascreenshot.jpeg?tl_px=1060,649&br_px=2780,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

The production scenario will outline stock shortages and you can view this by selecting the shortfall tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/54aff602-f31a-4500-802f-395786af2b1b/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=993,242

The list of items will need to be procured to fulfil the production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/16657ef3-c113-4e36-b8a8-1f11a02367d1/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=817,62

You can toggle between simple and advanced view to assess the stock availability breakdown.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/c7e9186f-bde7-4092-ac2d-45022e5a1af3/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=732,64

To view a complete breakdown of the BOM structure and component availability, select the drop down arrow.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/6901bff6-45bf-4f22-8c69-f9eeb7440e49/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=92,161

Upon completion, select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/c58b532a-5715-4ff8-9171-

0b538c5443d8/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=966,61

Enter in the scheduled start date of production.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7cbea340-7c07-4c32-9a82-ed9234b1b6d8/ascreenshot.jpeg?tl_px=365,219&br_px=2658,1500&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/a68e5bc9-b094-4b70-a2ad-55a710d02233/ascreenshot.jpeg?tl_px=957,319&br_px=3250,1600&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/556f85b9-576d-4284-88c8-7e1fef1425e4/ascreenshot.jpeg?tl_px=634,785&br_px=2354,1746&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

You are able to create a pending order plan for the procurement department to order the shortfall stock items needed to complete the production order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/fd3cf4c3-dc55-44d3-8a1b-c30ef157eff1/ascreenshot.jpeg?tl_px=464,691&br_px=2184,1652&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Click "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7c4a185f-b217-4fbd-9a18-1eb7428c7b02/ascreenshot.jpeg?tl_px=996,783&br_px=2716,1744&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

- Create Production Plan - Make to Stock

Step 1: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/1047c67a-df3f-4349-a073-2d308cb674c9/ascreenshot.jpeg?tl_px=0,61&br_px=2293,1342&force_format=png&width=112

0.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=351,277

Step 2: Select "Make to Stock"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b91dbbed-8903-4416-9653-9860c31f32ef/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=400,202

Step 3: Select the assemblies you wish to add to the production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/c13c87e0-4bad-4073-8f63-a7cf109be92d/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=805,127

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/5f1612fb-b800-4344-a87a-30f3fbdbb467/ascreenshot.jpeg?tl_px=1572,255&br_px=3292,1216&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 4: Select the Products you wish to add to the production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/cea763e5-c7f5-4ff8-83c8-96f5c50c4865/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=915,203

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/77397f79-7d13-418a-93c9-b8ec96087e16/ascreenshot.jpeg?tl_px=1162,105&br_px=3456,1386&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=863,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/d827036b-ee95-49e5-9487-5297b6ad0fef/ascreenshot.jpeg?tl_px=1065,445&br_px=3358,1726&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: Enter the desired quantities for the assembly and product you wish you execute in the production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/6ffe29f4-9d7f-4518-b447-

0c6b610f15f0/ascreenshot.jpeg?tl_px=1736,241&br_px=3456,1202&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=798,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/d134dd70-e702-48f1-9918-40e9feccbd94/ascreenshot.jpeg?tl_px=1736,327&br_px=3456,1288&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=805,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/56851d92-4e97-4048-b67a-1ac57987259c/ascreenshot.jpeg?tl_px=1736,327&br_px=3456,1288&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=805,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/25479a95-fb44-45ed-891a-f7d0e060e864/ascreenshot.jpeg?tl_px=1736,595&br_px=3456,1556&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=546,276

Step 6: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b8dff638-75a7-454b-aac2-e8b26578cb60/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1010,66

Step 7: Enter whether the schedule is fixed or flexible.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/dada9d1a-f977-485d-bc69-0901ee9af7a9/ascreenshot.jpeg?tl_px=1078,435&br_px=2798,1396&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/a7580914-7e0f-472a-ab0a-0812e85fbc9f/ascreenshot.jpeg?tl_px=401,577&br_px=2694,1858&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 8: Enter the desired start date.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/f0a487cf-da5e-4dbc-8491-3eb998716fe2/ascreenshot.jpeg?tl_px=730,537&br_px=2450,1498&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/dc9ae10a-f736-473d-b7c5-8ab35b9fccc2/ascreenshot.jpeg?tl_px=746,939&br_px=2466,1900&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 9: Enter the delivery date.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/14e4ed97-eafd-48fa-a260-1f9fd240335d/ascreenshot.jpeg?tl_px=727,627&br_px=2447,1588&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/5b1f8f20-ba24-42de-8b60-e3a2800ca685/ascreenshot.jpeg?tl_px=837,0&br_px=3130,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,220

Step 10: Select "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/d51cfa3c-5b2a-42b7-8e3b-4fb41c501775/ascreenshot.jpeg?tl_px=731,575&br_px=3024,1856&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 11: The created Production Plan will be populated under the "Manage Production" Sub Module. You are now able to create Work Orders and Schedule Job Cards.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b7a22d62-8580-4b8a-bc17-85cda10fda21/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=55,243

- Create Production Plan - ArcAI

Step 1: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/b7262b8a-2349-4890-b84a-1b661f9f0ec0/ascreenshot.jpeg?tl_px=0,49&br_px=2293,1330&force_format=png&width=1120

.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=283,277

Step 2: ArcAI will present the suggested assemblies and products to add to a production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/3cfb3150-67ff-4da7-a3b3-0be899500838/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=482,171

You are able to forecast based on certain set timeline by using the "Months" dropdown list to alter the forecasted timeline.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/7afdc30d-b911-49b0-a2cd-36a31507ee0f/ascreenshot.jpeg?tl_px=720,437&br_px=2440,1398&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: You can edit the quantities of the suggested assembly or product quantity.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/7d8795bd-5db8-4231-bff0-effea07d5dc6/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=942,240

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/d0d757f3-b5f2-45d1-9a4f-6724228270ab/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=915,243

Step 4: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/714c95dc-4127-46ff-b780-10e66c7e54d7/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=908,122

Enter in the type, scheduled start date and expected delivery date.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/330888c6-b20a-483a-af5f-dc6c9e3d92fa/ascreenshot.jpeg?tl_px=810,427&br_px=2530,1388&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/f7cab1dc-7be6-4b46-9f9f-945150f15802/ascreenshot.jpeg?tl_px=734,683&br_px=2454,1644&force_format=png&width=1

120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/2534b755-8656-4c06-96a4-49c9af06d497/ascreenshot.jpeg?tl_px=727,547&br_px=2447,1508&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/a4818328-a12b-45c4-a184-5ae3df2c9a0d/ascreenshot.jpeg?tl_px=750,961&br_px=2470,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/69294c2b-0763-4f30-b68a-03c3af692fa6/ascreenshot.jpeg?tl_px=828,649&br_px=2548,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/9ab08979-075b-49d3-bb4c-2efe0bea405d/ascreenshot.jpeg?tl_px=985,161&br_px=2705,1122&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Select "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/605238b2-846e-4e92-9741-c62508530ecb/ascreenshot.jpeg?tl_px=972,739&br_px=2692,1700&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

The create production plan will be populated under the "Manage Production" Sub Module. You are now able to create Work Orders and Schedule and Assign Job Cards.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-03/456ea8fc-b33b-4dbd-8b18-cd96a68e5eef/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=54,296

- Create Production Plan - Able to Manufacture

Step 1: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/83d281c8-fe0e-4d9f-bb76-

d29655556f3d/ascreenshot.jpeg?tl_px=0,43&br_px=2293,1324&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=269,277

Step 2: Select "Able to Manufacture"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/ebf43eab-8a66-44af-ad5c-e1d64ab20ea0/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=529,125

Step 3: A global list of all assemblies and products which you have sufficient components in stock based on their BOM structure to manufacture will populate.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/200a4fdc-329b-4380-aca0-fc0cbb26a068/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=922,197

You are able to edit the quantity to produce.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/c92f74e6-84ae-442f-b229-091acc58fe4e/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=878,192

Step 4: Select "Create Production Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/4eca4636-4c37-4046-bd59-57c07e450653/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=781,177

Step 5: Enter the type, schedule date and expected delivery date.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/154e7a50-32fc-4318-a46f-d19e00dd39c9/ascreenshot.jpeg?tl_px=950,423&br_px=2670,1384&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/35862374-cea8-4680-86c8-66a37024544d/ascreenshot.jpeg?tl_px=816,647&br_px=2536,1608&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/2a0d5cc4-4460-4d40-9cd1-220e308abe32/ascreenshot.jpeg?tl_px=786,543&br_px=2506,1504&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/9e26adce-d9cf-4d7b-8f1b-8cb51a13dd5d/ascreenshot.jpeg?tl_px=866,961&br_px=2586,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/5f59befc-8d10-4419-b4ae-6640033f34fa/ascreenshot.jpeg?tl_px=784,633&br_px=2504,1594&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/e203e3b3-4b65-43fe-930e-b023a7d8b7be/ascreenshot.jpeg?tl_px=974,407&br_px=2694,1368&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 6: Select "Create"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/ce030ca8-a30a-4efd-8334-a8ba02fd0489/ascreenshot.jpeg?tl_px=988,733&br_px=2708,1694&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 7" The production plan has been created and is found under the "Manage Production" Sub Module. You are now able to schedule Work Orders and Create Job Cards to initiate the production process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/251239ac-6176-4329-91b3-1ed4d9b1f384/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1018,199

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/95ccc080-65b5-47d5-98ec-b6f2596cc898/ascreenshot.jpeg?tl_px=1736,247&br_px=3456,1208&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=893,277

- Schedule and Manage Production - Production Plans

Step 1: Select "Schedule and Manage Production"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0c82fc1e-6031-42be-8f03-1b19934e8355/ascreenshot.jpeg?tl_px=233,93&br_px=2526,1374&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

You will see a list of create production plans which are categorised by the type of production plan reason such as to fulfil a sales order or made to stock. You can view the progress of the production order and schedule and due dates.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/19faa9de-a9f3-4929-ac56-2ccb33dbd71e/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=55,202

If you drop down the production plan you can be the assemblies and products which need to be produced and part of the plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/f9be7b8d-6d4c-41f0-8886-da0b91eb4828/ascreenshot.jpeg?tl_px=0,91&br_px=2293,1372&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=100,277

To schedule a production plan you need to create a work order. Please use the following documentation to view the creation and work order process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/30ca25f3-0e76-4a23-be19-6d650a195fcd/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1014,199

- Schedule and Manage Production - Work Orders

Step 1: Select the production plan in which you wish to create a work order for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3d4281de-963f-4c1d-a81f-10ac18e7666d/ascreenshot.jpeg?tl_px=16,4&br_px=3456,1927&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1019,277

Step 2: Select "Create Work Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3b333151-9b8d-459e-82ac-517173a00d1b/ascreenshot.jpeg?tl_px=1162,329&br_px=3456,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=936,277

Enter in the work order start date and then you can select the quantities of the certain assemblies and products in which you want to make the work order for. You can create multiple work orders for a single production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/46926398-b4a8-4971-8286-d0a2bcb0675c/ascreenshot.jpeg?tl_px=119,203&br_px=2412,1484&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/71680cfc-3801-46b1-baec-980c73a55078/ascreenshot.jpeg?tl_px=982,473&br_px=2702,1434&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Enter in the execution quantity to be part of the work order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/d85ed7c7-4fdf-4ee9-ab7f-e4289edcff21/ascreenshot.jpeg?tl_px=925,409&br_px=3218,1690&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/91acf3c2-aca1-4494-81b4-587c7c546384/ascreenshot.jpeg?tl_px=1200,649&br_px=2920,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/7b5b8c14-101d-4113-9854-bcf4d760a41e/ascreenshot.jpeg?tl_px=1200,673&br_px=2920,1634&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/44cad91f-5d5f-40b4-81b2-0eb71bbd657b/ascreenshot.jpeg?tl_px=895,613&br_px=3188,1894&force_format=png&width=

1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

The work order has now been created and can be viewed under the work order tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/8588265e-18f9-48a6-ae9e-b5f2b0ad6601/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=322,206

You can drop down the work order to view the assemblies and products and their associated quantities part of the work order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0757333c-61b7-49bb-83c7-c26d154366a7/ascreenshot.jpeg?tl_px=0,181&br_px=2293,1462&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=100,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/dafb0928-4e82-4c96-8554-1a4445aa7cdb/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1037,227

You can now create job cards which for the entire work order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/b5a6091f-a82e-470a-8c8a-1ff5f7130888/ascreenshot.jpeg?tl_px=1736,333&br_px=3456,1294&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1005,277

- Schedule and Manage Production - Job Cards

Step 1: Select a work orders and and create a job card.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/11a1a059-1b58-44c1-a479-82f3ff7fc24e/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1041,229

Select "Create Job Card"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/041b9edb-ce26-45e4-a982-2ae6f40c2c69/ascreenshot.jpeg?tl_px=1736,341&br_px=3456,1302&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=940,277

Enter in the execution quantity assigned to the job card for each assembly or product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/37c37fda-8373-4745-870a-5b0564150ff8/ascreenshot.jpeg?tl_px=991,357&br_px=3284,1638&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/9cf738e9-8f6f-4e42-bf69-1be03be33ebb/ascreenshot.jpeg?tl_px=1204,619&br_px=2924,1580&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/32343fe9-cc42-463e-8dd7-80d981483431/ascreenshot.jpeg?tl_px=877,565&br_px=3170,1846&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

The job cards have now been created and you can view the created job cards by selecting the "Job Cards" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/847b0e38-d24b-46ae-a9bb-45d3ec88b0f3/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=451,214

A global list of all created job cards will be displayed on the Kanban board.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/4081b7d9-d4f7-43f0-8a39-e1f6d5d600cb/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=290,164

You can filter to the specific work order to view the job cards linked to that work order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/6805e0b3-633c-47ef-a993-18f6e40b9d7d/ascreenshot.jpeg?tl_px=0,489&br_px=1719,1450&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=436,276

You will now see the linked job cards. You can only start jobs once they have been assigned to an employee who will carry out the piece of work. You will do this by selecting the job card.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3fe61bb6-742a-40c5-8dfc-f2aa6f46f413/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=174,338

Select the user dropdown list and choose the employee who will execute the job card.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/91bd657d-748d-4989-aa63-fa3b146d0d49/ascreenshot.jpeg?tl_px=813,159&br_px=3106,1440&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/a60a5933-9347-447c-be00-5f0a2b278b38/ascreenshot.jpeg?tl_px=1098,497&br_px=2818,1458&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Click "Save"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/0fb3072f-a302-4e29-a92b-214ffd97e2a1/ascreenshot.jpeg?tl_px=1014,883&br_px=2734,1844&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

You can also bulk assign job by selecting the "Bulk Assign User" button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/91a0d910-b80b-419e-b9f3-30c586e533cf/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1005,121

Click "Select User"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/88be556a-ac7b-4e46-a515-f0d589a7d712/ascreenshot.jpeg?tl_px=1005,625&br_px=2725,1586&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Select the user.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/f1796e2a-87f9-4abb-b16b-0651f30423ff/ascreenshot.jpeg?tl_px=856,837&br_px=2576,1798&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Click "Confirm" and now all the job cards have been allocated to the user to execute.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-31/3a21e8f9-384c-40d0-ae5e-21cf9f02b594/ascreenshot.jpeg?tl_px=1050,735&br_px=2770,1696&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

- Schedule and Manage Production - Production Gantt Chart

Step 1: Select "Pre Production"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/ca66182b-38fe-484d-89b7-5a6476b31aed/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=431,163

Step 2: Select "Schedule and Manage Production"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e9495f80-8308-46e0-9b28-c1b372c49631/ascreenshot.jpeg?tl_px=283,51&br_px=2576,1332&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: Select "Production Gantt Chart"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/62b6acad-164d-4724-a25e-7c513b72c5c2/ascreenshot.jpeg?tl_px=215,0&br_px=2508,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,202

Step 4: All of your current production plans will be populated on the Gantt Chart. You are able to select a bar to view the production plan details.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/10dc6a30-03cb-4480-81a8-de850852d374/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=624,228

Step 5: You can use the drop down tool to view all the work orders which from part of the Production Plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/51878d1d-9b7f-4c9b-8fc1-86b5a04e9ec3/ascreenshot.jpeg?tl_px=0,341&br_px=1719,1302&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=143,277

Step 6: Work Orders can be further broken down into the associated products and assemblies which form part of the work order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/b1819f30-4966-4642-9213-e996fa7a098f/ascreenshot.jpeg?tl_px=0,415&br_px=1719,1376&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=163,277

Step 7: Assemblies and Products can be further expanded to view the progress of their associated children in the production process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/5e16c881-9458-4442-b4b6-5187b8d02e8f/ascreenshot.jpeg?tl_px=0,575&br_px=1719,1536&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=188,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/fd300d97-6c52-4c96-9a47-6420359908e9/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=74,286

Production Operations

Overview Description:

The Production Operations Sub Module is an operational tool utilised by the factory floor workers during the production process.

It facilitates the kitting of assemblies and final assemblies prior to embarking on their manufactured routes for either as an assembly or product.

Users are able to view their jobs allocated to them, the instructions for the process linked to the job and also the workstations in which are assigned to to complete the job.

Definitions

Sub Assembly Kitting Area

The Sub Assembly Kitting Area marks the beginning of an assembly's journey along its route. Here, users can access a comprehensive list of all the items required for assembly, enabling them to gather and group these components efficiently to progress through the sub assembly route.

Final Assembly Kitting Area

The Final Assembly Kitting Area marks the beginning of the final assemblies journey along its route. Here, users can access a comprehensive list of all the items and assemblies required for the final assembly, enabling them to gather and group these components efficiently to progress through the final assembly route.

Note: before any assemblies and products can be initiated through their route using job cards, you will need to action the sub assembly and final assembly kitting areas before the components are pushed through to production. Essentially, step 1 of every production process is to kit the sub assembly or final assembly so all the necessary components are gathered prior to the production processes and routing.

Jobs

Jobs are created and assigned to employees which form part of a Work Order. These jobs are directly associated with particular processes that must be executed as part of the manufacturing route for an assembly or product.

Workstations

A workstation is a designated area within a production line where employees gather to perform their assigned tasks and related processes.

Processes

A Process is associated with a job card, detailing tasks for an employee to carry out. These processes occur at workstations and involve three main stages: Input, Process, and Output. The Input comprises the collection of items or assemblies, while the Process entails utilizing instructions and tools to transform the Input into an Output. This Output represents the completed task, which subsequently serves as the Input for the next process along the manufacturing route for the assembly or product.

Process Flow

Walkthrough Documentation:

- Sub Assembly Kitting Area

Step 1: Select "Sub Assembly Kitting"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/a7ff3e43-3b09-4c56-af26-0e60bbab5b13/ascreenshot.jpeg?tl_px=0,47&br_px=2293,1328&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=273,277

Step 2: You will view a list of what needs to be kitted under the "Required to Kit" tab before the production can start. You must select the "Reserve and Kit" button to start the kitting process for the linked sub assembly.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/85d7f7ce-f7e8-438c-ab58-

b812ef06b10d/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1008,275

Step 3: Enter the quantity you wish to kit and the employee who is kitting.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/5f49b9cb-cae2-40b5-987d-0ed11893e001/ascreenshot.jpeg?tl_px=783,517&br_px=3076,1798&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/11ba59c6-d1b7-4b24-aea6-6f119c15ac60/ascreenshot.jpeg?tl_px=876,1024&br_px=2596,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,281

Step 3: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/60955314-c7fa-4715-8650-b7c5b50ab487/ascreenshot.jpeg?tl_px=994,777&br_px=2714,1738&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

Step 4: Select "In-Progress" to complete the kitting of the components.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/a2416266-b90a-4830-8948-8726c67becd6/ascreenshot.jpeg?tl_px=0,123&br_px=2293,1404&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=438,277

Step 5: Select "Start Kit"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/eb117931-802c-4600-ad76-4e719aa7e742/ascreenshot.jpeg?tl_px=16,4&br_px=3456,1927&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1013,277

Step 6: Enter the quantity, employee and add a unique carrier ID. A carrier ID is the unique identifier of the temporary carrier used to hold the components.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/7578e5b2-7521-4727-9686-e9c0956b6e75/ascreenshot.jpeg?tl_px=985,521&br_px=2705,1482&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/69acdd4f-2891-48de-a564-d056302db177/ascreenshot.jpeg?tl_px=884,593&br_px=2604,1554&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/fe7e3c28-7ba6-465d-90d5-959bd7d0c9b1/ascreenshot.jpeg?tl_px=760,973&br_px=2480,1934&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/b58864cc-7aa1-4db3-a939-62fd2f57976b/ascreenshot.jpeg?tl_px=810,705&br_px=2530,1666&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 7: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/5a773956-22a0-4c02-b155-bc80a028164f/ascreenshot.jpeg?tl_px=1090,829&br_px=2810,1790&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 8: You will now be taken to a page which shows the details of the kitting. Initially you will view a reference list of the components needed to be kitted. Select "Pick" to start the picking.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/900e8c04-3fbe-400c-88f6-4b22af2b602e/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=219,230

Step 9: Use the checkbox functionality to select the components in which you have picked.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/c9897bf1-6cd3-4072-88c8-48dc2cb0acf2/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1014,342

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/0d7b763f-9c8b-4c55-b9ce-342219737850/ascreenshot.jpeg?tl_px=1736,925&br_px=3456,1886&force_format=png&width

=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=940,276

Step 10: Select "Save Progress"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/7954d40c-1945-478c-89db-33010ecd6d04/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=912,159

Step 11: Select the warehouse area in which you have picked the components from and select "Complete Pick".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/15b66c5e-9b4c-452b-bbe1-88754961e2ea/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=994,159

Step 12: Select "Yes"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/eb5c4180-d7e6-4a89-9e70-d89a18c8485b/ascreenshot.jpeg?tl_px=1190,649&br_px=2910,1610&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 13: You have now kitted the components and now have to push the components to production. Select "Ready for Production".

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/9dc4ffdf-68f8-4148-994d-87b9b9e6e7a2/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=425,211

Step 14: Select the specific kit and select the button on the right.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/1ecec112-300a-4784-9b19-ae8560516e48/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1016,295

Step 15: Select "Issue to Production"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/8203edb0-1671-4474-ab4e-ee863838d09f/ascreenshot.jpeg?tl_px=1736,609&br_px=3456,1570&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=886,277

Step 16: Enter the quantity and the employee.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/bd96b600-97b6-4995-b268-2f3b769e16f4/ascreenshot.jpeg?tl_px=765,539&br_px=3058,1820&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/c4bf6af1-b0cd-4322-b1a4-4b96696d1746/ascreenshot.jpeg?tl_px=727,1024&br_px=2447,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,299

Finally, select "Confirm" and the kit and components are pushed through to production for the manufacturing route to commence.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/d0b721ae-45f7-4d22-b722-28d33dc370eb/ascreenshot.jpeg?tl_px=962,777&br_px=2682,1738&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

- Final Assembly Kitting Area

Step 1: Select "Final Assembly Kitting"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/527a5a35-4f5f-4d1b-8eb7-6f422d73d485/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=415,186

Step 2: You will view the pending kitting under "Required to Kit". You will need to action these kits and execute a kit of assemblies and components for the final assembly prior to the production route can start. You will select the Kit button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/f3ddcf65-1536-4517-aca2-df84556c3e5c/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1013,273

Step 3: Enter in the quantity and employee who reserved and will be kitting.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/81c3a4c9-1ea7-47ca-9d93-

365a0d603915/ascreenshot.jpeg?tl_px=775,497&br_px=3068,1778&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/2f2f45a5-647b-4808-80be-df575ccea898/ascreenshot.jpeg?tl_px=878,1021&br_px=2598,1982&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 4: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/7d82dc3e-5e3c-405a-99ea-a1ab45ff2c02/ascreenshot.jpeg?tl_px=1002,769&br_px=2722,1730&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 5: Select "In-Progress" to view the kitting which you just reserved.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/4a96f35a-9d93-4a65-8e35-1f9cef0d3c7d/ascreenshot.jpeg?tl_px=0,101&br_px=2293,1382&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=392,277

Step 6: Select the icon to start kitting.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/e1744f28-a2dd-41d6-8c82-e3279c2c411c/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1014,273

Enter the quantity, select employee and add a carrier ID which is a temporary holding container for the kit.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/39fcbffc-27c0-498f-b4cc-f183386bed11/ascreenshot.jpeg?tl_px=932,535&br_px=2652,1496&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/98e4c7cb-22c2-4a14-8cc3-fff30129ed29/ascreenshot.jpeg?tl_px=862,605&br_px=2582,1566&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/2671800e-dfb3-4d40-8119-32e2a835aa4a/ascreenshot.jpeg?tl_px=772,965&br_px=2492,1926&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/4fc3b6dc-9111-47d9-8493-d299e79598ac/ascreenshot.jpeg?tl_px=716,747&br_px=2436,1708&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,276

Step 7: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/a96a53ff-e764-46cf-b1bc-384d928f1e84/ascreenshot.jpeg?tl_px=968,809&br_px=2688,1770&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 8: You will be taken to the picking list page to process and pick the items and assemblies needed for the final assembly kit. The reference list will show you a list of items and components needed. Select "Pick" to initiate the picking.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/870ba3f8-6524-4c20-804d-377e9a770351/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=210,234

Step 9: Select the raw materials needed to be picked from the raw materials warehouse area type.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/66a80c83-4191-4f32-9a17-bd8bdd46b135/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1015,399

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/b7fae1b2-0294-4c85-a24f-0e0a294a2b5d/ascreenshot.jpeg?tl_px=1736,847&br_px=3456,1808&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=947,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/305b4de5-876d-4157-a89d-3c7fe5224e61/ascreenshot.jpeg?tl_px=1736,759&br_px=3456,1720&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=945,277

Step 10: You have now picked the raw materials. Select "Save Progress" and then pick the remaining stock from the other warehouse area types.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/187131f3-7081-4282-be77-37a80742cfb8/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=903,163

Step 11: The assemblies need to be picked from the "Sub Assembly Shelf". You must select this to initiate the picking.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/801d76ec-15e9-4e4a-bab1-92190d4af265/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=870,314

Use the checkbox to process and pick.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/1c17cafa-5916-48fc-b7db-fd21eb13dd88/ascreenshot.jpeg?tl_px=1736,755&br_px=3456,1716&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=932,277

Click here.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/968a4267-3b6f-4ba0-9196-d1f1dbd1e4d5/ascreenshot.jpeg?tl_px=1736,829&br_px=3456,1790&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=938,276

Step 12: Select "Save Progress" to save the pick.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/d35bd7e7-72a5-46f2-b6cb-9a889a78e2d0/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=933,152

Step 13: You have now picked all items and assemblies needed for the kit.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/50d15507-f9ca-432a-8a2f-9e4840b1c80c/ascreenshot.jpeg?tl_px=1162,637&br_px=3456,1918&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=784,277

You can see the reference list to view the status of the pick and any remaining items or assemblies to be picked.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/97a3b2ac-7463-4985-b640-b7f44d72a32c/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=221,235

Step 14: Select "Complete Pick"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/ac9ea3dd-0a2b-4a08-84eb-82eb030b29e9/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=950,255

Click "Yes"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/d2707ad7-6612-4212-aa85-d0c7e4356696/ascreenshot.jpeg?tl_px=1118,641&br_px=2838,1602&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 15: You now need to issue the kit to production.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/75f6d274-4875-4d2c-9211-5f79e1985862/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1016,275

Select "Issue to Production" which will transfer the stock to production which will enable the production process to be initiated.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/6385cfcf-f27e-476e-9827-1c70b0d5474c/ascreenshot.jpeg?tl_px=1736,473&br_px=3456,1434&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=887,277

Enter the quantity, employee and whether you wish to auto generate a serial number.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/62959266-34b4-4ab4-890f-f910e7694d29/ascreenshot.jpeg?tl_px=965,611&br_px=2685,1572&force_format=png&width=1

120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/b4d89380-f198-4976-bcb5-b1b7ebe51452/ascreenshot.jpeg?tl_px=793,959&br_px=2513,1920&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 16: Select "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-04/0c00abac-ffcd-4502-8dad-b11a369065e5/ascreenshot.jpeg?tl_px=945,865&br_px=2665,1826&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

- Allocated Jobs and Performing Processes

Step 1: Select "Jobs"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/8455a7dd-fd3a-4ebb-8932-fdd2944d0bbf/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=419,186

Step 2: The user will view all the jobs allocated to them. The user will select the specific job to complete the process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/3e067043-4744-4895-822b-cc7278ddeca9/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=142,191

Step 3: The user will view the inputs received for this task, the process which needs to be completed and submit the output. The user will start by selecting "Receive and Start". Will means that the user confirm that they have received the input stock and have initiated the process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/45a2c440-d546-4d07-838a-9578e68aef7b/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=985,214

Click "Start"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/250a7403-c6dd-43fc-9028-102f47400b10/ascreenshot.jpeg?tl_px=1098,673&br_px=2818,1634&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 4: Select "Process"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/b2227dd9-537a-4773-bdac-c92fa3ba5062/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=440,256

The process will outline the tools and instructions needed to transform the input into the desired output during this process in the associated manufactured route. Upon completion, the user must select the "Output" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e6d2fd1b-422a-4ac6-89e6-34ca7ed0bdae/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=426,148

Step 5: The output tab will display the expected output and the associated quantity. Upon process completion, the user must enter in the quantity in which they will submit which will feed into the next process in the route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e84a8a27-5594-433a-bb9c-8c20ce8eaf4f/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=892,217

Step 6: The user must select "Submit"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/2e2f26c6-4069-4c2d-8d4a-2992da4edf08/ascreenshot.jpeg?tl_px=1162,135&br_px=3456,1416&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=936,277

Step 7: The user will select their name in the dropdown which gives an audit trail of who completed the process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/ae15d68a-b547-425f-abe3-3f9470dbed5c/ascreenshot.jpeg?tl_px=944,587&br_px=2664,1548&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/dc95a69f-5204-494d-83b1-27a700c823c3/ascreenshot.jpeg?tl_px=872,823&br_px=2592,1784&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 8: Select "Submit" which will state that the process has been completed and the output will feed as an input into the next process.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f8bc8a8c-888b-476a-a8b8-d307a5de7c0e/ascreenshot.jpeg?tl_px=970,709&br_px=2690,1670&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

- Unallocated Jobs

Step 1: Select "Jobs"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/d7530c8c-9ea7-4df6-bf82-da5312e15a0a/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=430,173

Step 2: Select "Unallocated Job Cards"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/4817a6a2-f6b5-4868-b73d-6dca64188e2a/ascreenshot.jpeg?tl_px=62,11&br_px=1781,972&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: A global list of all created job cards, which have not been allocated to an employee, will be displayed in the table. You can select the specific job cards which you wish to allocate to an employee.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/cf5a4fd3-b2b3-401b-9244-aa60176215a2/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=50,194

Step 4: Once selected, you will use the drop down list to allocate the job cards to a specific employee.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/3635e363-0542-4daa-ae2a-4b371e8036be/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=733,207

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e09793da-862a-4863-a549-74b6e02faeab/ascreenshot.jpeg?tl_px=1736,241&br_px=3456,1202&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=619,277

Step 5: Select the "Allocate Jobs" button to allocate the job card to the selected employee.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/818e2973-afb9-4f2f-bec4-edbd79272077/ascreenshot.jpeg?tl_px=1736,21&br_px=3456,982&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=905,277

Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/02dac9a7-3ffb-420b-af0c-1c15e65835d1/ascreenshot.jpeg?tl_px=1110,677&br_px=2830,1638&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

The newly allocated job card will now be populated under the "Allocated Job Cards" tab.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/a44c0eb1-5459-4699-a4ce-cc0cd9d8065a/ascreenshot.jpeg?tl_px=0,9&br_px=1719,970&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=135,277

- Issue Extra Stock

Step 1: Select "Issue Extra Stock"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/3a5333e1-0762-45a7-8356-e5a40ba86a29/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=670,172

Step 2: Select "Issue Extra Stock"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/97b597cb-e269-4a9c-81dc-

4d6dd78831e4/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=938,121

Step 3: Select the production plan in which you wish to issue the extra stock to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/33bce20c-d7b7-461e-8191-72cfe9589f94/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=493,176

Step 4: Select the specific Work Order

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/6235a512-1ccb-4093-ad32-782d29b3bbaa/ascreenshot.jpeg?tl_px=857,0&br_px=3150,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,200

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/38d9acb4-64fc-4bd6-8567-89501c2487d5/ascreenshot.jpeg?tl_px=1112,93&br_px=2832,1054&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 5: Select the assembly or product in which you wish to issue the extra stock to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/27c17513-be4e-4e07-b285-8092ec21f48f/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=479,156

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/ed568730-4ec9-4455-b635-17b8bd8e5247/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=410,187

Step 6: Select the current process in which the stock needs to be issued to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/fcc602ff-e537-469a-9614-10293ca73542/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=574,159

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/65e58cf0-f2b3-4a8c-8df7-28f60e57976d/ascreenshot.jpeg?tl_px=1046,211&br_px=2766,1172&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

Step 7: Select the user who is issuing the stock.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/47f57e3d-356b-442a-801d-f809a89ed0e9/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=509,192

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/3d0ded06-4274-4bf8-9dfe-5df3adf2a1cf/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=464,245

Step 8: Select the warehouse area in which you are taking the stock from.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/1cf3efd4-48ac-4636-a047-215ce4d32a0a/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=609,249

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/dd0af88e-3a59-4e0b-8222-74575c0c780a/ascreenshot.jpeg?tl_px=1154,475&br_px=2874,1436&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 9: Select the extra assembly or item in which you wish to issue.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/3f5c8a17-da06-4f5e-a97f-7c04c906e9af/ascreenshot.jpeg?tl_px=1736,397&br_px=3456,1358&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=762,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/fa066e83-d308-4186-9e75-b66341a4f6b8/ascreenshot.jpeg?tl_px=1162,459&br_px=3456,1740&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=805,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/677e7568-5dce-4110-82cc-a98cb3037fed/ascreenshot.jpeg?tl_px=1162,63&br_px=3456,1344&force_format=png&width=1

120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=886,277

Step 10: Enter in the quantity of the item you wish to issue.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/41bb0b8c-d196-4d32-a8f5-32c77a02c52f/ascreenshot.jpeg?tl_px=1162,447&br_px=3456,1728&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=852,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/63e6d646-a83a-474d-849c-c63c5d5a7bf9/ascreenshot.jpeg?tl_px=1736,255&br_px=3456,1216&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=787,276

Step 11: Select "Issue Stock"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f1249933-fccf-4729-978e-ccc03cc30ca4/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=968,121

Step 12: Enter the reason for why you are issuing extra stock.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/48b8f0ca-bf66-4e4f-b217-07131911fde5/ascreenshot.jpeg?tl_px=896,615&br_px=2616,1576&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 13: Select "Submit". The stock will now be issued to the process and removed from the selected warehouse.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9a53c98c-97af-4dcd-b05b-83842ce3b310/ascreenshot.jpeg?tl_px=1004,721&br_px=2724,1682&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Production Overview

Overview Description:

The Production Overview Sub-Module serves as a comprehensive management tool, enabling you to monitor the real-time status of work-in-progress across various aspects of your production operations. This includes tracking the activities of employees, the performance and utilization of workstations, and the current state of assemblies and products in the manufacturing process.

One of the key features of this sub-module is its ability to provide a detailed, real-time snapshot of ongoing production activities. Managers can observe the progress of tasks assigned to employees, assess the efficiency and capacity of workstations, and follow the assembly and production stages of products. This real-time insight helps in making informed decisions, identifying bottlenecks, and ensuring that production schedules are adhered to.

Additionally, the Production Overview Sub-Module offers a comprehensive historical view of all manufactured assemblies and products. This historical data allows for thorough analysis and review of past production runs, facilitating continuous improvement and optimization of manufacturing processes.

Overview Video:

ProductionOverview.mp4

Walkthrough Documentation:

- Employees Work in Progress

Step 1: Select "Work in Progress"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/00a0fb6c-07ff-4bba-9ac7-17af3e3926dd/ascreenshot.jpeg?tl_px=0,173&br_px=1719,1134&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=387,277

Step 2: Select the "Employees" tab and you will view a list of all the employees and their associated work statuses. You can use the drop down toggle to view specific processes and jobs that the employee is linked to.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/3743d2bf-38bf-4030-b7b5-e8781f5783cd/ascreenshot.jpeg?tl_px=0,477&br_px=1719,1438&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=150,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/d27222ad-d516-4854-8953-f299bd4fd144/ascreenshot.jpeg?tl_px=0,477&br_px=1719,1438&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=150,277

- Workstation Work in Progress

Step 1: Select "Work in Progress"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/6e2c625f-1c71-40f5-96c2-

2af8218962ba/ascreenshot.jpeg?tl_px=0,43&br_px=2293,1324&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=254,277

Step 2: Select "Workstations"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/1c4a38c2-e5fc-4a0c-a236-9d6e257ed023/ascreenshot.jpeg?tl_px=16,263&br_px=1735,1224&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: The table will display all created workstations and their current status and activity. Select one of the workstations in operations to view the linked jobs.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/c2de1d3f-05fd-4761-bed8-a63ae4e1abb3/ascreenshot.jpeg?tl_px=0,63&br_px=3439,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=413,334

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a987cd12-0565-408f-b017-e10b0204f7ee/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=916,225

- Manufacturable Work in Progress

Step 1: Select "Work in Progress"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/fd6b5e43-3e94-44fd-adfb-302929fd7dd7/ascreenshot.jpeg?tl_px=0,163&br_px=1719,1124&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=395,277

Step 2: Select "Manufacturables"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/bfce8d90-a2d6-4ba7-b43e-01155b0f2aa9/ascreenshot.jpeg?tl_px=227,103&br_px=2520,1384&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: The table will display all assemblies and products currently in their production route.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/067ca888-734d-4d0c-a036-bde6a46e753e/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=891,211

- Production History

Step 1: Select "Production History"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/e432f68b-8534-4d91-83f7-cb4ec4ad976e/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=415,174

You will see a global table of every production and assembly that has completed it production route. There is historical meta data captured for accurate record keeping.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/3eecb45e-cb40-43e7-b15d-96c33f1a24a9/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=914,130

Dashboard

Overview Description:

The ArcFlow manufacturing dashboard provides both real-time and historical views of key manufacturing performance metrics. The dashboard features comprehensive metrics and charting capabilities, allowing you to track production volumes, failure rates, risk profiles, and outputs from employees and workstations. Additionally, it offers capacity analysis to ensure optimal utilization of resources and to identify potential bottlenecks in the production process.

Walkthrough Documentation:

- Manufacturing Dashboard

Fulfilment Overview

Fulfilment Module Description

The Fulfilment module oversees the processing of customers' completed sales orders, encompassing picking, packing, and customer delivery. Here are the five steps involved in this process:

- Completed Sales Orders: Real-time visibility into the progress of picking, packing, and customer delivery is provided through completed sales orders.
- Picking Slip Generation: Picking slips are generated, detailing the sellable products, assemblies, and quantities for warehouse staff to pick from inventory.
- Boxing and Labels: Selected products, assemblies, and items are packed into boxes and labeled for identification and shipping purposes.
- Holding Area: Packed boxes are temporarily housed in a designated area for final checks and verification before shipment.

- Shipping: Verified orders are dispatched for customer delivery, facilitated by shipping labels and accompanying documentation.

Fulfilment Module Process Flow

Fulfilment Sub Modules

- Fulfilment

The Fulfilment module oversees the processing of customers' completed sales orders, encompassing picking, packing, and customer delivery.

- Fulfilment History

The fulfilment history provides a record of all completed orders, detailing their processing journey from order receipt to delivery. It offers insights into order status, tracking information, and any actions taken during the fulfilment process, serving as a valuable reference for tracking order progress and resolving any issues that may arise.

Fulfilment

Overview Description:

The Fulfilment module oversees the processing of customers' pending and completed sales orders, encompassing picking, packing, and customer delivery.

Processes and Definitions:

Pending and Completed Sales Orders

Real-time visibility into the progress of picking, packing, and customer delivery is provided through completed sales orders.

Picking Slip Generation

Picking slips are generated, detailing the sellable products, assemblies, and quantities for warehouse staff to pick from inventory.

Boxing and Labels

Selected products, assemblies, and items are packed into boxes and labeled for identification and shipping purposes.

Holding Area

Packed boxes are temporarily housed in a designated area for final checks and verification before shipment.

Shipping

Verified orders are dispatched for customer delivery, facilitated by shipping labels and accompanying documentation.

Establishing Packaging Materials:

During the fulfilment process you need to box the completed goods to be delivered to your customers. This will entail having packaging materials available for packaging purposes. You will create these items through the blueprints module by either creating an assembly or items and tag them with the following attributes:

Is Shipping Container

If you tag an item as “Is Shipping Container” the system will store this items as a container for packaging completed sellable stock for customer delivery. These items will be presented in the fulfilment module when you need to allocate packaging materials for customer deliveries. An example of this type of item will be a wooden pallet.

Is Shipping Supplies

If you tag an Item as “Is Shipping Supplies” the system will store the item for the purposes of protecting sellable stock inside the shipping container. An example of this type of item would be bubble wrap.

Once you have created these assemblies or items and added stock quantity to your appropriate warehouses, they will then be populated during the “Box and Label” process in fulfilment. You are not able to box and label if you do not have sufficient stock on hand.

Overview Video:

Fulfilment.mp4

Walkthrough Documentation:

- Create Picking Slip

1\. This is the Sales Order tab under the Fulfilment screen.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/9d5c903c-6ed0-4579-a4f0-dd9a285d68f4/user_cropped_screenshot.jpeg?tl_px=9,0&br_px=2303,1112&force_format=png&width=1120.0

2\. We can drop down one of the Sales Orders to see the difference line items it is made up of.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ee5c6b1f-f600-4ba4-931d-9236b00679c5/ascreenshot.jpeg?tl_px=0,125&br_px=859,606&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=107,212

3\. If the icon is light green it indicates that this is unavailable for picking.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/08a211f7-9bb1-49bf-9485-787fc36d976d/ascreenshot.jpeg?tl_px=1468,366&br_px=2328,847&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=717,212

4\. Dark green indicates that it is ready to be picked.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/5728cab4-add0-4222-93a7-0864cdcbe8b3/ascreenshot.jpeg?tl_px=1468,123&br_px=2328,604&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=715,212

5\. Enter the quantity for each product that needs to be picked.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/56a0a5c3-739a-4388-9e4a-33d4402134aa/ascreenshot.jpeg?tl_px=1017,766&br_px=1877,1247&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. Alternatively use the "Populate All Pick Qty." button to set each quantity to its required amount.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/0a6ce50b-7a7e-4544-bf84-f01fd0213b8f/ascreenshot.jpeg?tl_px=1019,667&br_px=1879,1148&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

7\. Click "Confirm"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/3fb793c5-d63d-4021-b1f0-69adc60019e8/ascreenshot.jpeg?tl_px=910,829&br_px=1770,1310&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

8\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/893fdefa-0776-4e51-9d83-09040126b5d7/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=427,126

- Begin Picking

1\. We can initiate the picking process in the Picking Slip tab of Fulfilment.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/4b4b05e8-19db-48d0-81dc-b6f6ada32375/user_cropped_screenshot.jpeg?tl_px=17,0&br_px=2310,1063&force_format=png&width=1120.0

2\. Clicking the Start Pick button will begin the process. The newest invoices start at the top and older invoices work downwards. The picker should always look to pick the oldest invoice which has available stock.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d52a39e4-4da8-4ec6-bd97-cfb05e800399/ascreenshot.jpeg?tl_px=1468,123&br_px=2328,604&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=712,212

3\. Here we can see the reference list for the picking slip which tells us all the items which need to be picked across every warehouse.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/6ebdbba6-1c4b-424c-b2e0-bc5e3f77f464/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=2293,792&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=27,170

4\. Lets go across to the picking tab where the user will begin the picking action.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d39c76ef-2e01-488f-9e70-42d664451001/ascreenshot.jpeg?tl_px=0,7&br_px=859,488&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=394,212

5\. First they select which warehouse they are picking from currently.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/3d751b41-d4da-4d5b-bcb3-3761a9f2a7f6/ascreenshot.jpeg?tl_px=1468,91&br_px=2328,572&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=671,212

6\. They will see a percentage of how many items are available from the selected warehouse.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ac106447-f78a-49f3-a710-c9edb80a3c38/ascreenshot.jpeg?tl_px=1468,142&br_px=2328,623&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=646,212

7\. They can then select the line items as they pick them.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/8e1a8894-784c-4efc-ac0e-07fab4b0b81d/ascreenshot.jpeg?tl_px=1468,202&br_px=2328,683&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=648,212

8\. Once they have completed the pick they can then click "Complete Pick"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/17c481dc-f858-41a5-a5ab-149bd07afc1b/ascreenshot.jpeg?tl_px=1468,0&br_px=2328,480&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=706,128

9\. Click "Yes"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/1aabc9c0-7bc8-43e8-ae6f-6edd11451614/ascreenshot.jpeg?tl_px=891,825&br_px=1751,1306&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

- Box & Label

1\. Start by selecting which Picking Slip you would like to Box.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/968152dc-eaf1-424a-bfbb-0d0e9eaa5a26/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=173,137

2\. Here we have selected #463.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/91d33d7e-3a71-4a56-a64d-7177a87fca56/ascreenshot.jpeg?tl_px=0,262&br_px=859,743&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=380,212

3\. Time to select the package type we are packing into. We can select multiple packaging types if we use more than one.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/b042285b-c555-40a3-af79-

492e1ba3922c/ascreenshot.jpeg?tl_px=1320,106&br_px=2180,587&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

4\. We select the BIg Box to package our product and can view the remaining quantity available of said packaging type.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/f8991092-b047-4213-ae0f-9e69fa9a4c7d/ascreenshot.jpeg?tl_px=1299,153&br_px=2159,634&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

5\. Lets drop down the BIg Box so that we can allocate our product to it.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/a5c5fb97-89ba-407c-a470-84d49208d7c8/ascreenshot.jpeg?tl_px=1078,192&br_px=1938,673&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

6\. We now enter the quantity of this product we want to allocate to this packaging type. We know the total of this product we want to box by looking at the 'Qty. to Box' column.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/e0c6e753-1ba0-4fbe-81ce-25d8e65d17cf/user_cropped_screenshot.jpeg?tl_px=110,37&br_px=1487,807&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1005,360

7\. We then click this button to send the product into its package.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/ad7c08e2-9017-48ef-8b61-f9286f76e6ec/ascreenshot.jpeg?tl_px=1026,862&br_px=1886,1343&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

8\. Lets add some shipping material which will go inside the box with the product.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/da3514c3-fc85-4482-8bbf-ffbb5fb61f85/ascreenshot.jpeg?tl_px=1153,304&br_px=2013,785&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

9\.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/0e2f2853-664f-40ea-ad40-a2e1b4d90bc4/ascreenshot.jpeg?tl_px=1504,316&br_px=2364,797&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

10\. We are going to add Bubble Wrap into the Big Box.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/60ccc5d3-5886-441d-9e45-c780e77c3277/ascreenshot.jpeg?tl_px=1306,400&br_px=2166,881&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

11\. We will now enter the quantity of Bubble Wrap.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/64be5291-89c3-475a-949f-539d1a6bb600/ascreenshot.jpeg?tl_px=1583,387&br_px=2443,868&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

12\. Lets also add packaging peanuts.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/902afb34-e82d-40f4-bae2-9c2e618704e8/ascreenshot.jpeg?tl_px=1151,368&br_px=2011,849&force_format=png&width=860&wat_scale=76&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=402,212

13\. Now we are going to send this Big Box to the holding area.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-07/3c4c8b22-2bb8-4682-a35b-067eca4a0b43/ascreenshot.jpeg?tl_px=1435,48&br_px=2811,817&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=974,277

- Holding Area (Waiting for courier)

Step 1: Select "Fulfilment"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/b1c4c5ee-f91c-48fd-8202-607e8b4d3835/ascreenshot.jpeg?tl_px=0,11&br_px=2293,1292&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=279,277

Step 2: Select "Holding Area"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/ed19e064-a19b-4a1b-9c47-cb3a77a4f3f9/ascreenshot.jpeg?tl_px=77,0&br_px=2370,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,210

Step 3: All of the products which have been packed are now sitting in the holding area. Select the icon to add shipping information.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/d1d6a4bb-beba-4099-9ecd-01e743c0d0be/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=968,199

Step 4: Select the delivery type.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/45ffa613-121a-4bc2-b9fa-e91589e9f6c3/ascreenshot.jpeg?tl_px=797,265&br_px=3090,1546&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/4d4d83ba-80ec-47cc-aca6-4841b55f8de3/ascreenshot.jpeg?tl_px=501,507&br_px=2794,1788&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 5: Enter the Waybill/Shipping Number

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/31136f8b-9729-4235-ae9d-2b208ec429ca/ascreenshot.jpeg?tl_px=774,659&br_px=2494,1620&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 6: Select "Save"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/1a34deda-ade6-41f7-a690-897a840b8411/ascreenshot.jpeg?tl_px=735,703&br_px=3028,1984&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 7: Select "Ship Package"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/abb9e1ec-ecbc-4781-a11ee32c31e41180/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=969,194

Step 8: Select "Ship". You are also able to print and download delivery notes and shipping labels.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/92bcbddc-c78f-4155-b5ea-904284df3667/ascreenshot.jpeg?tl_px=775,647&br_px=3068,1928&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

- Ship and Track (Waiting for Courier)

Step 1: Select "Fulfilment"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/62be2c57-680d-48dc-9a0d-0cd5fd7d49dd/ascreenshot.jpeg?tl_px=0,17&br_px=2293,1298&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=289,277

Step 2: Select "Ship and Track"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/3d21023a-98b1-440e-a984-55f84a777eef/ascreenshot.jpeg?tl_px=727,23&br_px=2447,984&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

Step 3: A list of all of the your delivers will be populated. You can select a specific delivery to change the status.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/6c8d1fa6-34b6-41b3-a178-958a17beb0b9/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1020,191

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/57974a94-6c7d-423b-bc9e-b223f0ee04bb/ascreenshot.jpeg?tl_px=1066,507&br_px=2786,1468&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/04e38d69-c4c6-4f9c-bacb-a603ffd9a796/ascreenshot.jpeg?tl_px=840,833&br_px=2560,1794&force_format=png&width=1

120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/53893529-a931-40b8-8b1f-af318fd32f64/ascreenshot.jpeg?tl_px=998,723&br_px=2718,1684&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-06/a9570b7a-857a-4bd2-9460-fd152a647797/ascreenshot.jpeg?tl_px=1736,225&br_px=3456,1186&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=931,277

Fulfilment History

Overview Description:

The Fulfilment History sub-module provides a comprehensive historical overview of all your fulfilled orders.

Within this sub-module, you can meticulously track orders and their associated details, offering valuable insights into your fulfilment process. You will be able to view critical information such as the Sales Order Number, Date of Shipment, and Date of Arrival. Additionally, it includes details about the different shipping partners involved and the corresponding waybill numbers linked to each delivery. This level of detail allows you to monitor and analyse your fulfilment operations effectively, ensuring you have a clear understanding of your order delivery history and performance.

Overview Video:

FulHistory.mp4

Walkthrough Documentation:

- Fulfilment History

Step 1

Select the “Transfer History” button to view a history of all the stock and associated data transferred or received into a specific warehouse destination:

Step 2

A full history of all receipts and transfers will be populated with the stock items associated code, version, type, manufacturing batch number, manufacturing serial number, internal batch number, internal serial number, quantity, the warehouse it was transferred from and the destination warehouse along with the data in which the transfer or receipt occurred.

Document Hub Overview

Document Hub Module Description

The ArcFlow "Document Hub" serves as a centralized document repository for viewing and managing all documents uploaded onto the system, pertaining to various actions such as:

- Items
- Assemblies
- Products
- Node Items
- Suppliers
- Customers
- Manufacturers
- Subcontracted Routes
- Sales Persons
- GRN Delivery Notes
- Warranties

Document Module Process Flow

Document Hub

Overview Description:

The ArcFlow "Document Hub" serves as a centralized document repository for viewing and managing all documents uploaded onto the system, pertaining to various actions such as:

- Items
- Assemblies
- Products
- Node Items
- Suppliers
- Customers
- Manufacturers
- Subcontracted Routes
- Sales Persons

- GRN Delivery Notes
- Warranties

Overview Video:

DocumentHub.mp4

Walkthrough Documentation:

- Document Hub

Step 1: Click the "Document Hub" Module.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d6a495b6-4979-4e55-83a1-ba6b2c8c378b/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=660,489

Step 2: You are now at the document repository which is a global list of all uploaded document. You can filter the search by selecting the filtering button.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/a64b9f18-3867-4dc6-966f-ebc44a8c6530/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1044,98

Step 3: Select the different filters using the checkbox functionality.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/ca598421-1829-4a22-94e5-e5b68ad68ab5/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1044,98

Step 4: Click the "Search" field if you are looking for a particular file.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/cfd5d76c-077a-4338-b86f-7b37c4666c3a/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=751,104

Step 5: Click any category on the left NAV bar to filter your uploaded files into a specific category.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/71c8d52b-1251-4820-83a0-9f40440aa4ac/ascreenshot.jpeg?tl_px=0,25&br_px=1719,986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=171,277

Step 6: Click the "View Document" icon to open a PDF viewer of the specific document.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/21eefb35-4f7c-4b07-ab29-6fb5ae05c154/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=995,173

Step 7: You are able to "Go to Document" by selecting the icon below. This will route you to the specific area in which the file was uploaded for.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-06/d6e1588d-e50f-4bba-b9a5-0c108d138aa7/ascreenshot.jpeg?tl_px=1736,163&br_px=3456,1124&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=958,277

- AI Functionality Overview
- AI Functionality Description
- ArcFlow leverages AI technology to enhance manufacturers' productivity with existing resources. By automating repetitive tasks, the system optimizes resource allocation and enhances decision-making efficiency.
- The AI models leverage over 100 input data points, which are stored, analyzed, and processed to generate outputs that support accurate decision-making. These models improve over time as more transactions occur and historical data accumulates, allowing for continuous training and enhancement of the models' accuracy.
- At its core, ArcFlow offers three AI-driven features: Supplier KPI and Selection, Order Plan Automation, and Production Order Automation.
- AI Model Diagram
- The AI model comprises of:
- Input Parameters: the raw data sets which are fed into the Input Layers.
- Input Layer: Extracts the meaningful and relevant data from the Input Parameters.
- Hidden Layers: Analyses the data and their respective importance weighting and adjustments overtime into the AI model to create accurate AI model outputs.
- AI Output: The results of the computations to create an accurate suggestive output.
-
- AI Functionality Features:
- Supplier KPI and Selection

Streamline and automate supplier selection decisions during the procurement process.

- Order Plan Automation

Automating the order plan creation for optimal quantities and timing for ordering specific materials.

- Production Order Automation

Automating production order creation and scheduling for different products and assemblies with their associated quantities.

Supplier KPI and Selection

Overview Description:

The Suppliers KPI and Selection model evaluates supplier performance based on various metrics such as the quality of items supplied, overall performance, delivery efficiency, and cost. These KPI metrics are integrated into a supplier selection model, which helps the system recommend the best suppliers to order from during the quoting and purchase order stages, considering specific constraints.

Overview Video:

Supplier_AI.mp4

Walkthrough Documentation:

- Viewing Supplier Item KPI and Performance

Step 1: Select "Vendors/Manufacturers"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/2ebb789b-daa8-41fc-959a-8348ac2bba98/ascreenshot.jpeg?tl_px=16,0&br_px=3456,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=658,177

Step 2: Select a specific supplier you wish to assess.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/10b73aaf-7abd-43d3-a5f4-1821592d6976/ascreenshot.jpeg?tl_px=0,44&br_px=3439,1967&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=494,276

Step 3: Select "Items"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/d117212e-4b50-4790-9a8c-a77689910bcd/ascreenshot.jpeg?tl_px=218,0&br_px=1937,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,255

Step 4: You are able to view the supplier KPI for each items which they supply.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/bccceb5f-ead4-44e2-b9ad-97b8c08c97de/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=272,175

The supplier KPI data is fed into the order plan and quotation stage to ensure you have the best suggestions on which supplier to order form.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/d39fdac6-8882-4b27-8589-0e7b34a7a15b/ascreenshot.jpeg?tl_px=0,0&br_px=1719,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=201,85

If you select "Create Material Order" to create an order plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/282a8817-0e79-4a9f-8cf3-fe3094f66fe2/ascreenshot.jpeg?tl_px=68,193&br_px=1787,1154&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

You can select the specific items in which you wish to order.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/a7eec255-9c20-492e-a2d4-49e626f3c10b/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=607,210

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/28f25a0f-9e02-4734-9396-e4632ea36362/ascreenshot.jpeg?tl_px=1334,279&br_px=3054,1240&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/9aa448b1-d3f4-4c39-b7d0-b488761fdb7e/ascreenshot.jpeg?tl_px=1336,369&br_px=3056,1330&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e1b55559-acfe-4142-b79c-7a21f0fbe1f9/ascreenshot.jpeg?tl_px=1336,451&br_px=3056,1412&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-

recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

You will select "Create Order Plan"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/f295d670-8ec6-4544-a6f3-b9cd2bb0c58c/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=896,119

If you select the specific order plan you with to generate an RFQ for it will display a table of all order plan items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/3d085724-561b-4f9c-b3fe-a9acdaddd6b2/ascreenshot.jpeg?tl_px=21,251&br_px=2314,1532&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,277

If you select the supplier icon you will view the possible suppliers and the suggestions from whom to order from.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/19812961-f66b-4581-8437-8ca0fc60d8b0/ascreenshot.jpeg?tl_px=1162,413&br_px=3456,1694&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=665,277

The suppliers ranking and KPI for the item will be displayed in the popup.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/becbbb19-5c75-4aae-831c-b545b933b93b/ascreenshot.jpeg?tl_px=1162,407&br_px=3456,1688&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=663,277

Order Plan Automation

Overview Description:

The Order Plan Automation model leverages various data sets, including minimum stock levels, sales demand, supplier performance, and production plan requirements, to generate an automated list of suggested items. This ensures your company always has the necessary materials and products available when needed.

Overview Video:

PRO_FINAL.mp4

Walkthrough Documentation:

- Create Material Order Plan using ArcAI

Step 1: Select "Create Material Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/b7a11305-5efd-46e9-9e78-6e6fe64e3bd7/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=279,276

Step 2: Select "Arc AI"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/51928772-1601-42c0-afc7-61de1be9166a/ascreenshot.jpeg?tl_px=0,13&br_px=1719,974&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=375,277

A list of all the suggested items and their quantities are listed in the table.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/598dc759-1a48-4174-aa07-74a55ecaa2e9/ascreenshot.jpeg?tl_px=0,0&br_px=3439,1922&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=404,199

You can select the supplier icon to view the potential suppliers, their rank and the ordering score. The linked suppliers with be added to the order plan and ready to be sent an RFQ.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/c085b8ee-6942-43e0-b9c2-e8f694121710/ascreenshot.jpeg?tl_px=205,81&br_px=2498,1362&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,277

You can select the "Months" dropdown list which will alter the forecasting date range and adjust the suggested ordered quantities.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/7d3b7c10-6855-48bb-8d36-9fb8d3fcede1/ascreenshot.jpeg?tl_px=1162,0&br_px=3456,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=1029,213

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/7023eb92-701a-4e24-9b87-058e1fe7d7db/ascreenshot.jpeg?tl_px=1736,317&br_px=3456,1278&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=880,276

The AI is suggestive and you have the ability to edit the quantities and remove listed items.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e06f49c7-5c2b-4c0c-8a56-597703c23051/ascreenshot.jpeg?tl_px=1736,239&br_px=3456,1200&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=856,277

Step 4: Select the "Create Order Plan" button to create the order plan based on the suggested items and their associated quantities.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-06-02/e695947c-d26c-415c-b241-9afd377eab63/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=783,202

Production Order Automation

Overview Description:

Production Order Automation involves the automatic creation and scheduling of production orders for various products and assemblies, along with their associated quantities. It utilizes multiple data sets, such as demand forecasting, production times, and stock holding requirements, to generate optimal production plan suggestions.

Overview Video:

Manufacturing_AI.mp4

Walkthrough Documentation:

- Create Production Order using ArcAI

Step 1: Select "Create Production Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/8e676ef1-8f98-4f83-a22d-dbf4c7814409/ascreenshot.jpeg?tl_px=0,0&br_px=2293,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=284,261

Step 2: Select "Arc AI"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/f76f4335-cd53-4b7d-b558-0a3102d04b02/ascreenshot.jpeg?tl_px=67,0&br_px=2360,1281&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=523,204

A list of the products and assemblies that are suggested are presented in the table below with their quantity.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/60d397a6-046b-4805-b49f-b1ce424cbeaa/user_cropped_screenshot.jpeg?tl_px=0,0&br_px=3439,1809&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=484,167

Step 3: Select the number of months you wish to forecast you production plan.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/6ee6168e-c583-4ad1-8bf0-ab61708dc14b/ascreenshot.jpeg?tl_px=784,449&br_px=2504,1410&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=524,276

Step 4: You are able to use human judgement and alter the AI suggestions by selecting the quantity field and typing in your final quantity.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/ea4512c9-4bde-40af-95a3-4a727e0aca96/ascreenshot.jpeg?tl_px=1162,207&br_px=3456,1488&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=861,277

Step 5: Select "Create Production Order"

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-08/8fe250fd-4548-4e0e-82c3-17091858649d/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=891,172

Module Dependancy Overview

ArcFlow Interconnected and Module Dependancy Overview

The interconnected nature of the ArcFlow system ensures a smooth flow of data across its various modules. This connectivity paves the way for heightened automation and more efficient workflows within the system.

In this current overview, we'll delve into the dependencies between different modules and provide insights into how users should navigate and anticipate the completion of workflow processes.

Module Dependancy Focus Points:

- Production and Routing

The production of assemblies and products depends on creating eligible routes for each assembly and product. After creating your items, assemblies, and products in the blueprints module, you must establish their manufacturing routes.

- Warehouse Stock, Kitting and Job Cards

When initiating a production process by creating a production plan, there are two key dependencies that must be addressed before a job card can be initiated by a system user who has access to the “Manufacturing Operations” Sub Module.

- Warehousing and Fulfilment

The fulfillment module handles the picking, packing, and dispatch of customer deliveries. To ensure smooth operations, all stock intended for delivery must be stored in a Finished Goods area.

Routing and Production

Overview Description:

The production of assemblies and products depends on creating eligible routes for each assembly and product. After creating your items, assemblies, and products in the blueprints module, you must establish their manufacturing routes.

A product comprises multiple child assemblies and items, with each child assembly having its own BOM (Bill of Materials) structure, including further child assemblies and items. Each level of an assembly's BOM structure requires a manufacturing route, which then integrates into the higher-level route of the products it is linked to.

The routing of a product begins with manufacturing all sub-assemblies according to their respective manufacturing routes. Once these assemblies are manufactured, they become inputs for the product's manufacturing route, continuing until the finished product is complete.

It is crucial to note that you cannot manufacture an assembly or product without an established manufacturing route.

Overview Video:

Routing and Production.mp4

Warehouse Stock, Kitting and Job Cards

Overview Description:

When initiating a production process by creating a production plan, there are two key dependencies that must be addressed before a job card can be initiated by a system user who has access to the “Manufacturing Operations” Sub Module.

Job cards are dependent on the kitting processes for sub-assemblies or final assemblies. A user cannot start a job card if the items or assemblies required for the job are not kitted and pushed to production.

In the kitting module, users will see a list of items and assemblies to be kitted for a specific manufacturing route and its associated job cards. Kitting can only proceed if there is sufficient stock available in the warehouse for the required items or assemblies.

Essentially, warehouse stock is needed for kitting, and job cards can only be initiated once the necessary materials have been kitted. During the assembly route, the process concludes with storing the assembly in the appropriate Sub Assembly Warehouse. This sub-assembly stock, once the route is completed, will then be used in the final assembly kitting area for the product's final production processes which is then stored in the Finished Goods Warehouse.

Inter Connectivity Diagram:

Warehousing and Fulfilment

Overview Description:

The fulfillment module handles the picking, packing, and dispatch of customer deliveries. To ensure smooth operations, all stock intended for delivery must be stored in a Finished Goods area.

During the picking process, the fulfillment module only checks stock availability in the Finished Goods warehouse. At the end of the production process, finished goods are stored in this warehouse, marking the completion of the process.

However, there are unique situations to consider. If you have an item or assembly that is sellable but currently stored in an Item Warehouse or Sub-Assembly Warehouse, you must transfer this stock to the Finished Goods area to fulfill customer orders.

Even if an item or assembly is sellable, if it is not stored in the Finished Goods area, the system will not recognize its availability during the fulfillment stage, and you will be unable to process the delivery. Therefore, ensure all sellable stock is transferred to the Finished Goods area before fulfillment.

Inter Connectivity Diagram:

Overview Video:

Warehouse and Fulfilment.mp4

Overview and Documentation Templates

ArcFlow Automated Document Generation Overview

During manufacturing operations and processes, ArcFlow captures essential information from customers, suppliers, employees, stock, and sellable items, as well as assemblies and products. This system meticulously records and organizes data, ensuring all critical aspects of production are monitored and documented. By automating the generation of necessary documentation, ArcFlow streamlines workflow and reduces the administrative burden on your team. This automation ensures accuracy and efficiency, allowing you to focus more on core business activities while maintaining comprehensive records.

The following documents are generated below:

Procurement

- Request for Quotation with Online Review Button
- Request for Quotation without Online Review Button
- Purchase Orders
- Goods Received Note

Blueprints

- Assemblies
- Products

Manufacturing

- Picking Slip
- Packing Slip

Sales

- Sales Quotation with Discount
- Sales Quotation without Discount
- Sales Order with Discount
- Sales Order without Discount
- Proforma Invoice with Discount
- Proforma Invoice without Discount
- Sales Invoice with Discount
- Sales Invoice without Discount
- Picking Slip
- Packing Slip
- Customer Return

Storage of Documents

The storage of all of the auto generated documents are found under the “Document Hub” module. Generated documents will be categorised and stored in the document repository for tracking and viewing purposes.

ArcFlow Automated Document Templates

- Procurement

Request for Quotation with Online Review Button

PDF - Procurement - RFQ with button.pdf

Request for Quotation without Online Review Button

PDF - Procurement - RFQ without button.pdf

Purchase Orders

PDF - Procurement - PO.pdf

Goods Received Note

PDF - Procurement - GRN.pdf

- Blueprints

Assemblies

PDF - Blueprint - ASSEMBLY.pdf

Products

PDF - Blueprint - PRODUCT.pdf

- Manufacturing

Picking Slips

PDF - Manufacturing - Picking Slip.pdf

Packing Slips

PDF - Manufacturing - Packing Slip.pdf

- Sales

Sales Quotation with Discount

PDf - Sales - Sales Quotation with Discount.pdf

Sales Quotation without Discount

PDF - Sales - Sales Quotation without Discount.pdf

Sales Order with Discount

PDF - Sales - Sales Order with Discount.pdf

Sales Order without Discount

PDF - Sales - Sales Order without Discount.pdf

Proforma Invoice with Discount

PDF - Sales - Proforma Invoice with Discount.pdf

Proforma Invoice without Discount

PDf - Sales - Proforma Invoice without Discount.pdf

Sales Invoice with Discount

PDF - Sales - Sales Invoice with Discount.pdf

Sales Invoice without Discount

PDF - Sales - Sales Invoice withoiut Discount.pdf

Picking Slip

PDF - Sales - Fulfilment Picking Slip.pdf

Packing Slip

PDF - Sales - Fulfilment Packing Slip.pdf

Customer Return

PDF - Sales - Customer Return.pdf

In-App Support Functionality

Overview Description:

ArcFlow engineers will provide real-time support through messaging, screen sharing, and audio features, ensuring your operations continue smoothly without disruptions.

Walkthrough Documentation:

- In-App Support

Step 1: Select the chat icon at the top right of your screen.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/a2ee9fd3-176e-4664-9c78-673ad91afd06/ascreenshot.jpeg?tl_px=1736,0&br_px=3456,961&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=915,13

Step 2: Enter in your name

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/42bd13fb-8f0e-4665-a173-a6c57d3100e7/ascreenshot.jpeg?tl_px=16,63&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=910,418

Step 3: Enter in your Email Address

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/88b0f520-b6f5-485e-9ffc-ec33fe5e864b/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=724,332

Step 4: Select the "Start the Chat" button. You will be connected with an ArcFlow engineer and will be able to utilise real time messaging, audio communication and screen sharing.

!https://ajeuwbhvhr.cloudimg.io/colony-recorder.s3.amazonaws.com/files/2024-05-30/2aa60194-7615-44f7-a98e-bba9d2fb8c9b/ascreenshot.jpeg?tl_px=1736,1024&br_px=3456,1986&force_format=png&width=1120.0&wat=1&wat_opacity=0.7&wat_gravity=northwest&wat_url=https://colony-recorder.s3.us-west-1.amazonaws.com/images/watermarks/FB923C_standard.png&wat_pad=789,403