Batch Entry

The *Batch Entry* screen is used to manually create batches for production. A batch number can be generated automatically or entered manually for every new order.

- When the *Create Batches with Release Status* option is selected on the *Production Setup* screen, the batch will be created with Released status.
- If this option is not selected, the batch would be created with *New* status and the appropriate person would need to change it to *Released* using the *Release* button under the special function

You can create the following types of batches:

- **Mix:** Intermediates and finished goods can be made with this type of batch. A mix-type batch is appropriate where mixing ingredients is required. It needs an associated formula.
- **Fill:** Only finished goods can be made with a fill-type batch. Filling of intermediates is also done through this type of batch (e.g., filling tomato sauce into a bottle or orange juice into a jar). A fill-type batch requires an Intermediate key.
- **Assembly:** Only finished goods can be made with an assembly-type batch. Assembling is typically done through this type of batch because it fills your mixed-mode needs. An assembly-type batch requires an associated assembly BOM key.

An assembly-type batch can be used to combine two or more previously created finished goods into a new product, with or without additional packaging (e.g., a Personal Care manufacturer may combine a large shampoo and a medium conditioner into a display box for Mother's Day gifts).

Multiple finished goods that utilize the same formula or assembly BOM key can be created in a single batch. A batch can also be created via the following screens:

- *Transfer MPS Production Orders* (MPS).
- *Transfer MRP Production Orders* (MRP).
- *Transfer SO to Batches* (Production Utilities).
- *Create Batches from Schedules* (Production Utilities).

If all conditions are satisfied when a batch is created (the batch is associated with a process cell, and the process cell is associated with a formula in the *Process Cell Formula Capacity* screen),

the application would suggest the batch start date and end date based on the batch quantity and process cell capacity.

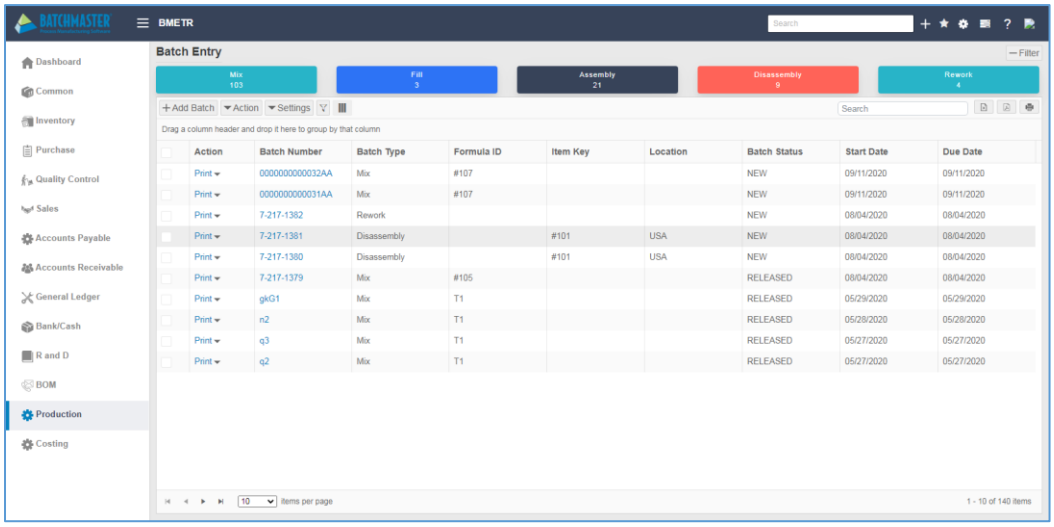
Prerequisite

- A BOM should have been created and released before a batch is created.
- The WIP account number should have been defined on the *Production Setup* screen before an assembly-type batch can be created.

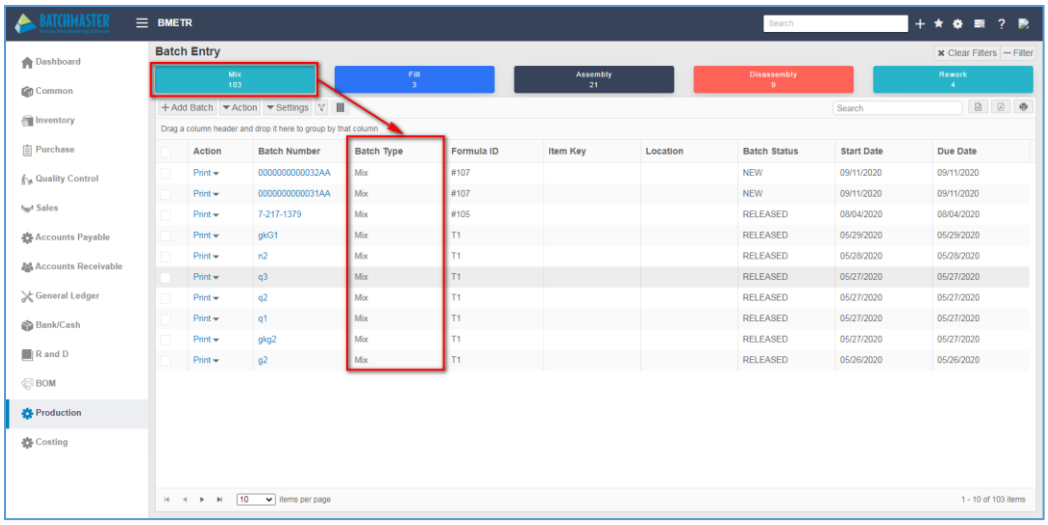
Go To: Production → Production → Batch Entry.

Batch Entry – Dashboard

You can manage batches from this dashboard. By default, the system displays all the existing batches maintained for your business/company. You can click on any of the batch record to view its details. By default this dashboard displays all type of batch records.



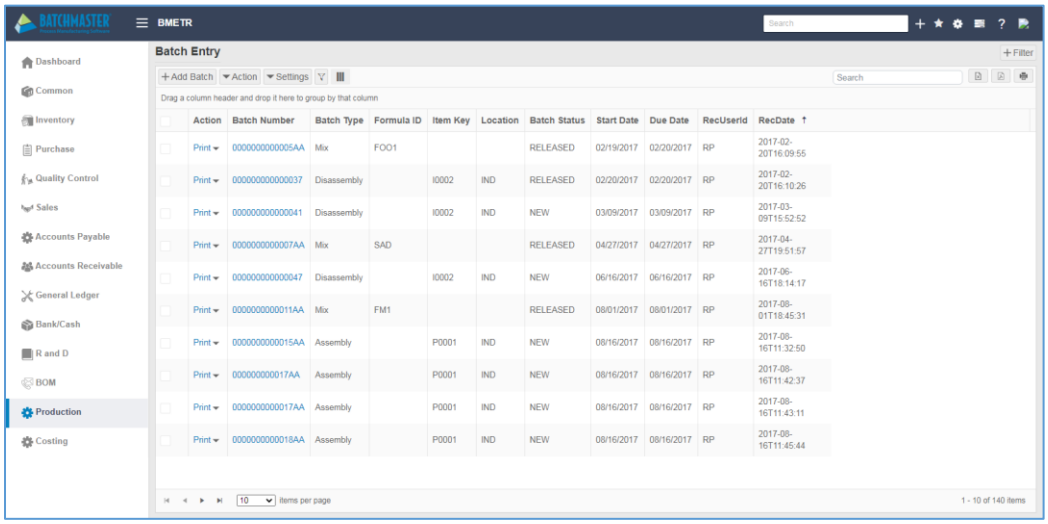
You can click on any of the *Mix/Fill/Assembly/ Disassembly/Rework* button to filter the batches records accordingly.



The *Batch Entry* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.
Using the *Action* button from the dashboard you can:

- Print selected batches
- Copy selected batch to create new one
- Release selected batches
- GoTo Batch Ticket
- GoTo Batch Close
- Delete selected batches

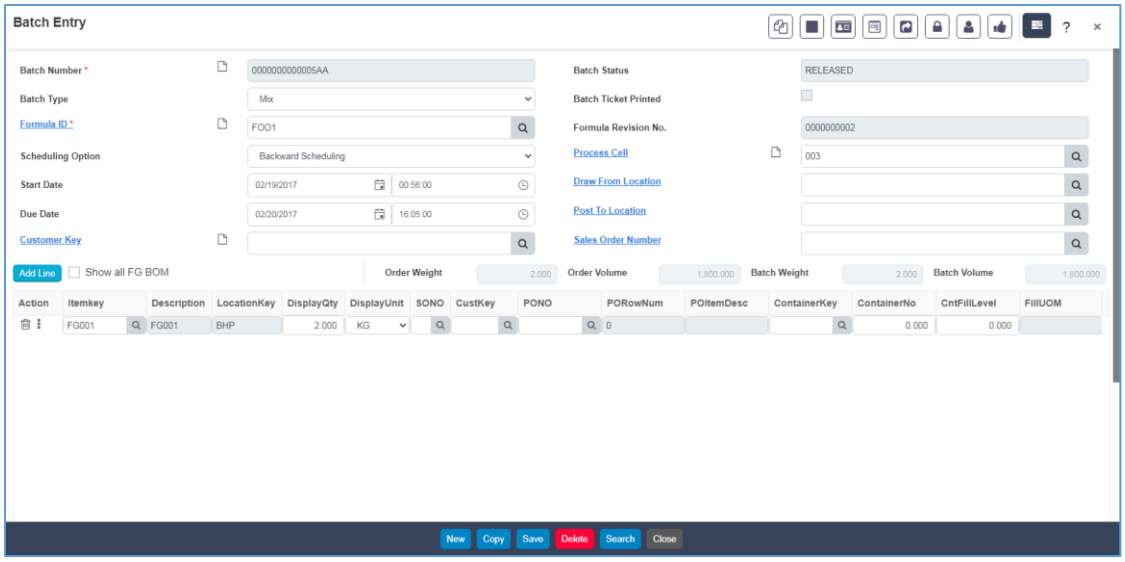
After you select all the columns of the *Batch Entry* dashboard, the middle grid displays the selected columns.



The *Batch Entry* dashboard provides a clear vision of the created records in a read-only mode. You can view the records as per the number of pages provided per page.

Batch Entry Screen – Add Mode

To create a new batch to your BatchMaster database, click on the + *Add Batch* button. The system displays the *Batch Entry* screen, where you can create new records.



Header Fields

Batch Number: This is the number assigned for unique identification of this Batch. This can be generated by three ways depending on the selection made while making a new Batch Entry.

These three ways are as follows:

1. **Automatic Entry**: If this option is selected, Batch Number is generated automatically by the system; incrementing the last assigned number by 1.
2. **Manual Entry:** If this option is selected, the Batch Number needs to be entered by the user.
3. **Batch Series:** If this option is selected, the Batch Number would be generated and incremented as per the series defined on the *Batch Number Generation* Screen. Batch Series enables one to track the batches month-wise, year-wise, formula-wise or by customer/Vendor wise.

Batch Status: Batch processing is a multi-stages process involving creation, allocating, issuing etc. The stage a batch has achieved in its process at the manufacturing end is determined in BatchMaster WEB for user reference through its status. Status tracking ultimately improves all, Inventory tracking, batch scheduling, and production control. The available Statuses are NEW and RELEASE.

If 'Create Batches with Release Status' option is selected at the *Production Setup* screen, the Batch is created with 'RELEASED' status. While if this option is let un-chosen, the batch is created with status 'NEW' and user needs to make it 'RELEASED' using the *Release* button under the special function.

Note: Each newly created batch is saved with New status which allows modifications as well. When released the status get changed to Release, i.e. the Batch can be transferred to *Batch Ticket* screen. As a result users are not allowed to commit any change.

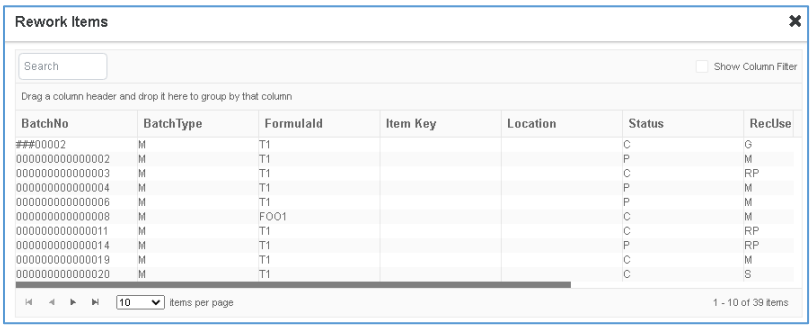
Batch Type: This field determines the nature of the batch, which could be one of:

1. **Mix:** In this type of batch, the Formula materials are processed and filled directly into the 'container'. This type of a batch requires a formula.
2. **Fill:** In this type of batch, an already manufactured Intermediate is packed into a 'container'. This type of a batch requires an Intermediate Key.
3. **Assembly:** In this type of batch, finished goods are repackaged, e.g., bottles in a case. This type of a batch requires an assembly BOM.
4. **Disassembly**: In this type of batch, an intermediate item filled in one or more containers can be emptied so as to recover both the intermediate item and the containers for reuse.
5. **Rework:** In this type of batch, you can make minor corrections in a batch or a part of it according to the standards. The rework batch option is helpful mainly when a batch or an end item of a produced batch, does not meet the standards, and hence, involves a minor rework over the selected produced lot. The screen allows you process a closed batch as well as select an existing inventory for rework. The rework type of batch does not require a formula key since the item to be reworked has undergone production previously.

Rework by: This field is enabled in case when you select *Rework* type of batch in the *BatchType* field. Use this field to select one of the option:

- **Batch No**: If *Batch No* option is selected in the *Rework by* field, you need to select a rework batch using the lookup next to the *Batch No* field.
- **Finished Goods**: If *Finished Goods* option is selected in the *Rework By* field, an existing item (Finished Goods) can be selected using the lookup next to the *Itemkey* field in the grid. In this case *Batch No* field is disabled.

Batch No: Use this field to specify the batch number using the lookup next to the field. Clicking on the lookup displays the *Rework Items* window for selection of the rework batch.



This field is enabled when *Rework* option is selected in the *Batch Type* field and Batch *No* option is selected in the *Rework by* field.

Formula ID: This field should be filled in accordance with the value selected at the *Batch Type* field:

1. **Mix:** A Formula ID should be specified here. This is the formula that is to be used for producing the end items of this batch.
2. **Fill:** This field remains disabled in case *Fill* option is selected in the *Batch Type* field.
3. **Assembly:** This field remains disabled in case *Assembly* option is selected in the *Batch Type* field.
4. **Disassembly:** This field remains disabled in case *Disassembly* option is selected in the *Batch Type* field.
5. **Rework** This field remains disabled in case *Rework* option is selected in the *Batch Type* field.

This is a mandatory field.

Formula Revision No.: This is the version of the selected formula from which this particular batch is being made. The value at this field gets fetched while selecting a Formula ID for this batch. Versioning of formulas help in better tracking of batches. At any instance in future, user can easily track all batches which were manufactured from a particular version. This is a read-only field.

Intermediate Key/Assembly Key: This field changes according to the option as selected in the *Batch Type* field.

- In case of *Mixed* Type of batch this field is disabled.
- In case of *Filled* type of batch, an Intermediate Key should be entered here. This key refers to the intermediate that is to be filled into a container for producing the end item of this batch. The lookup at this field displays all the released BOMs.
- In case of *Assembly* type of batch, Assembly Key should be entered here. The lookup at this field displays all those released BOMs which have 'Assembly' as it's Assembly Type.
- In case of *Disassembly* type of batch, an Intermediate Key should be entered here.
- In case of *Rework* type of batch, this field remains disabled.

Assembly/Intermediate Description: This field displays the description of the Intermediate/Assembly key. This is a read-only field.

Location: This field is enabled when the Batch Type selected is either Fill or Assembly. It actually determines the Location from where the intermediate Item is to be fetched for filling or an Assembly item is to be used for assembling. This is a read-only field.

Process Cell: On selecting a formula key the system would default the attached process cell (if process cell is attached with the formula on the *Formula Entry* screen). This is the Process Cell associated with this batch, which implies that the production of this batch shall take place in this Process Cell. The

capacity utilization of this process cell for the scheduled start date of this batch can then be viewed via the 'Capacity Utilization' screen under the Process Cell module. The capacity utilization is determined using the capacity considerations maintained for this process Cell on the 'Process Cell Formula Capacity' screen. On the basis of this capacity utilization, the Process Cell Scheduling can be done via the 'Process Cell Scheduling' screen.

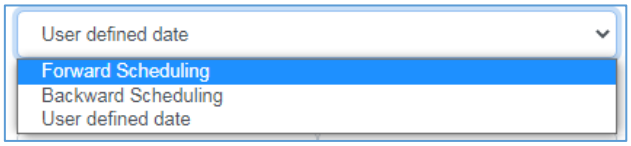
If Routing has been implemented then the Process Cell field takes on a different meaning. Routing Entry needs to be defined for the Process Cell-End Item combination in order to save the batch. Labor transactions for this combination then need to be defined and closed before a batch can be closed.

The lookup at this field displays all the process cells that have been associated (via the Process Cell Formula Capacity screen) with

- Any Formula ID (if this is a Mix Batch)
- Any Intermediate Key (if this is a Fill Batch)
- Any Assembly Key (if this is an Assembly / Rework batch).

Note: While working with the Batch Entry screen, saving the Production Batch with a Process Cell assigned, system throws a warning message if the total weight exceeds the process cell capacity. This ensures appropriate assignment of Process Cell with the batch.

Forward Scheduling/Backward Scheduling/ User defined date: In both Forward and Backward Scheduling, based on the batch quantity and process cell capacity the system would auto calculate the start and end date (lead time) of the batch including the holidays defined on the Company Calendar. If routing is implemented and Process Cell is defined, then selecting this option restricts BatchMaster WEB from changing the Start Date with regards to routing. Start Date is calculated automatically by the system based on the Due Date and Lead Time. To refrain system from calculating the Start Date automatically, this option must be selected.



Draw From Location: If there are any location preferences for drawing raw material for this specific batch, then it can be specified here. All materials (raw materials as well as packaging items) for this batch will be issued only from this location. This location supersedes the location(s) associated with the:

- Item Locations (raw materials as well packaging or sub-assembly items) that are used in the selected formula
- The selected Intermediate Key

This is an optional field.

Post To Location: This is the location to which the end item(s) will be posted. This location supersedes the actual locations associated with the end items and byproducts.

Start Date: This is the date on which the production of this batch is scheduled to start. The actual production of this batch is allowed to commence on a different date. If routing is implemented, in case of Backward scheduling, the start date is automatically calculated by the system based on the Due Date and lead time.

Due Date: This is the date on which the production of this batch is scheduled to complete. The actual production of this batch is allowed to complete on a different date. If routing is implemented, in case of Forward scheduling, the start date is automatically calculated by the system based on the Due Date and lead time.

Note: In both Forward and Backward Scheduling, based on the batch quantity and process cell capacity the system would auto calculate the start and end date (lead time) of the batch including the holidays defined on the Company Calendar.

Customer Key: This field is for user reference. If this batch is being produced against a sales order or is fulfilling multiple sales orders, then the associated customer will be displayed at this field. In case of a batch fulfilling multiple Sales Order, separate lines are inserted corresponding to each order and each line holds the associated Customer Key.

When the batch is saved, this customer key gets defaulted to the 'CustKey' field of the grid for all the End Items selected at this grid. However, this customer key can be changed at the grid. This is an optional field.

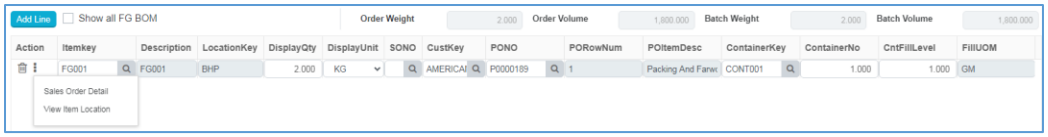
Customer Name: This field displays the description of the customer key. This is a read-only field.

Sales Order Number: This is the sales order for which this batch is being produced. When the batch is saved, this sales order gets defaulted to the 'SONO' field of the grid for all the Item Locations selected at this grid. However, this sales order and the corresponding customer can be changed at the grid. This is an optional field.

Print Batch Ticket Checkbox: This box informs the user whether the Batch Ticket for this batch has been printed or not. It becomes checked after the Batch Ticket has been printed by clicking the Print button from the dashboard. It remains unchecked otherwise. This is a read-only field.

User Defined date: If routing is implemented and Process Cell is defined, then checking this box restricts Batchmaster WEB from changing the Start Date with regards to routing. Start Date is calculated automatically by the system based on the Due Date and Lead Time. To refrain system from calculating the Start Date automatically, this box must be checked.

Grid Fields



Add Line Button: When the *Show all FG BOM* checkbox is un-checked, clicking this button displays:

- All the Released BOM's for the finished goods and the intermediates that use the selected Formula ID (if this is a Mix type Batch)
- All the Released BOM's for the finished goods that use the formula associated with the selected Intermediate Key (if this is a Fill type batch)

When the 'Show all FG BOM' box is checked, clicking the *Add Line* button displays:

- All the Released BOM's for the finished goods that use any formulas (if this is a Mix type Batch). The lookup is not limited by the Formula ID selected for this batch
- All the Released BOM's for the intermediates that use the selected Formula ID (if this is a Mix type Batch)
- All the Released BOM's for the finished goods that use any formula (if this is a Fill type batch). The lookup is not limited by the Formula ID associated with the Intermediate Key selected for this batch

This button is disabled in the case of an Assembly type batch.

Show all FG BOM: When the 'Show all FG BOM' box is checked, clicking the *Add Line* button displays:

- All the Released BOM's for the finished goods that use any formulas (if this is a Mix type Batch). The lookup is not limited by the Formula ID selected for this batch
- All the Released BOM's for the intermediates that use the selected Formula ID (if this is a Mix type Batch)

All the Released BOM's for the finished goods that use any formula (if this is a Fill type batch). The lookup is not limited by the Formula ID associated with the Intermediate Key selected for this batch.

When the 'Show all FG BOM' box is un-checked, clicking the *Add Line* button displays:

- All the Released BOM's for the finished goods and the intermediates that use the selected Formula ID (if this is a Mix type Batch)
- All the Released BOM's for the finished goods that use the formula associated with the selected Intermediate Key (if this is a Fill type batch)

Order Weight: This is the total order weight calculated on the basis of the order quantities of all the End Items specified at the grid. The Order Weight for an End Item is calculated as follows:

1. If the Bill of Material for the End Item is of Finished Good type, then,
    a. If the Fill Level of BOM is specified in Weight, then the Order Weight is determined by multiplying the Fill Level of BOM with the Order Qty in Stock UOM.
    b. If the Fill Level of BOM is specified in Volume, then the Order Weight is determined by multiplying the Order Volume with the Density of the item. The Order volume is determined by multiplying the Fill Level of BOM with the Order Qty in Stock UOM. The Density is taken from the Formula.
2. If the Bill of Material for the End Item is Intermediate type, then the Order Weight is determined by multiplying the ordered Quantity (in Stock UOM of the End Item) with applicable conversion factor for converting the Stock UOM to the System Weight UOM. The conversion factor is taken from one of the following scopes (in decreasing preference):

a. Item Master level

b. Item Class Level

c. Global Level

For an Assembly type batch, the Order Weight is not considered in BatchMaster WEB.

Order Volume: This is the total order volume calculated on the basis of the order quantities of all the End Items specified at the grid. The Order Volume for an End Item is calculated as follows:

1. If the Bill of Material for the End Item is of Finished Good type, then,
    a. If the Fill Level of BOM is specified in Volume, then the Order Volume is determined by multiplying the Fill Level of BOM with the Order Qty in Stock UOM.
    b. If the Fill Level of BOM is specified in Weight, then the Order Volume is determined by dividing the Order Weight with the Density of the item. The Order Weight is determined by multiplying the Fill Level of BOM with the Order Qty in Stock UOM. The Density is taken from the Formula.
2. If the Bill of Material for the End Item is Intermediate type, then the Order Volume is determined by multiplying the Ordered Quantity (in Stock UOM of the End Item) with applicable conversion factor for converting the Stock UOM to the System Volume UOM. The conversion factor is taken from one of the following scopes (in decreasing preference):
    a. Item Master level
    b. Item Class Level
    c. Global Level

For an Assembly type batch, the Order Volume is not considered in BatchMaster WEB.

Batch Weight: This is the total Batch Weight calculated on the basis of the order quantities of all the End Items specified at the grid. The Batch Weight is generally larger than the Order Weight to accommodate the Formula Loss Constant, the Formula Loss Factor, the Formula Line Loss and any byproducts produced by the formula.

For an Assembly type batch, the Batch Weight is not considered in BatchMaster WEB.

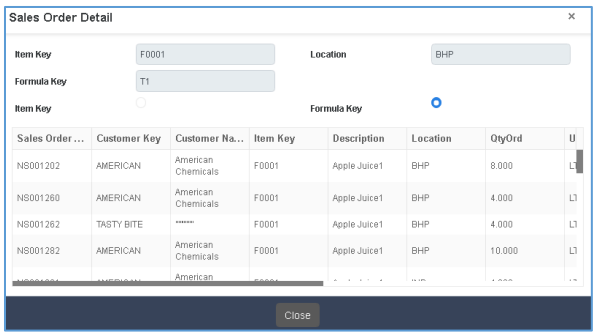
Batch Volume: This is the total Batch Volume calculated on the basis of the order quantities of all the End Items specified at the grid. The Batch Volume for an End Item is calculated as follows:

1. If the Bill of Materials for the End Item is Finished Good type, then the Batch Volume is determined by dividing the Batch Weight with the Formula Density.
2. If the Bill of Material for the End Item is Intermediate type, then the Batch Volume is determined by dividing the Batch Weight with the density. This density is equal to: (the conversion factor for converting the Stock UOM to the System Weight UOM)/ (the conversion factor for converting the Stock UOM to the System Volume UOM).These conversion factors are taken from one of the following scopes (in decreasing preference):
    a. Item Master level
    b. Item Class Level
    c. Global Level

For an Assembly type batch, the Batch Volume is not considered in BatchMaster WEB.

Action  **:** The following options are available under this section.

- **Sales Order Detail**: Clicking on this option pops up a window which gives details of all sales orders existing in BatchMaster WEB for an item or for all items made from a given formula.



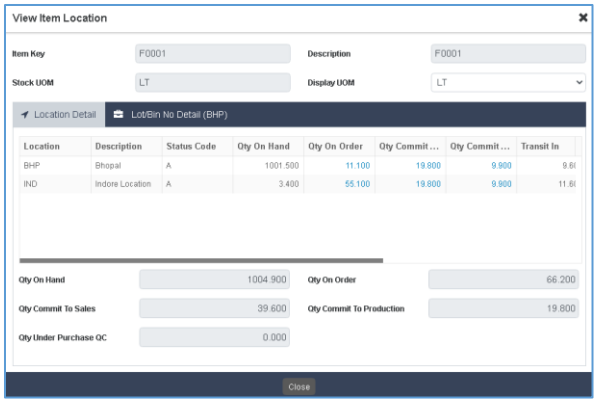
- **View Item Location**: The user may click this option to view the inventory details for all the item-locations of the selected End Item. The inventory details of an Item Location include the following:

  Location Detail:

  - Status Code
  - Quantity On Hand
  - Quantity On Order
  - Quantity Committed to Sales
  - Quantity Committed to Production
  - Transit In Quantity
  - Transit Out quantity
  - Quantity Oversold
  - Qty under Purchase QC
  - Multiple Bins Requirement (Yes or No)

  Lot/Bin Number Details

  - Bin Number
  - Lot Number
  - Received Date (the date on which the lot was received)
  - Expiry Date
  - Quantity On hand
  - Quantity Committed
  - Vendor Lot Number
  - Vendor Key
  - Lot Status
  - User Id
  - Record Date



Itemkey: This field determines the end item that will be produced from this batch. The Item Key of the end item is defaulted at this field when

- A line is added via the *Add Line* button or the Show Finished Goods button under the special functions.
- An Assembly Key is entered for an Assembly type batch.

Description: This is the description or name of the End Item that is to be produced from this batch. This field is defaulted when

- A line is added via the *Add Line* button near the grid or the Show Finished Goods button under the special functions.
- An Assembly Key is entered for an Assembly type batch.

LocationKey: This is the location to which the End Item produced will be posted. This location cannot be changed. To post the end item to some other location, the *Post to Location* field can be used. It gets defaulted when

- A line is added via the *Add Line* button near the grid or the *Show Finished Goods* button under the special functions.
- An Assembly Key is entered for an Assembly type batch.

DisplayQty: This is the quantity of the End Item to be produced. This quantity must be greater than zero.

DisplayUnit: This is the Stock unit of this End Item. The end item will be produced and stocked in this unit.

SONO: This field is for user reference. If this batch is being produced against a sales order or is fulfilling multiple sales orders, then the SO Number of the corresponding Sales Order will be displayed at this field. In case of a batch fulfilling multiple Sales Order, separate lines are inserted corresponding to each order and each line holds the associated Sales Order Number.

If a sales order number selected at the 'Sales Order Number' field on the header of this screen, it gets defaulted to this field. This defaulted sales order number can be changed. This is an optional field.

CustKey: This field is for user reference. If this batch is being produced against a sales order or is fulfilling multiple sales orders, then the associated customer will be displayed at this field. In case of a batch fulfilling multiple Sales Order, separate lines are inserted corresponding to each order and each line holds the associated Customer Key.

When the batch is saved, this customer key gets defaulted to the 'CustKey' field of the grid for all the End Items selected at this grid. However, this customer key can be changed at the grid. This is an optional field.

PONO: Field specifies the unique Purchase Order Number against the Job Work Batch. This is an auto generated number, generated as soon as user saves the Job Work Batch. User can view the generated purchase order on the Purchase Order Entry screen. The number gets defaulted to the Purchase Order Number field at the Purchase Tab of the Purchase Order Entry screen.

PORowNum: This field displays the row number of the line in the grid.

POItemDesc: Field displays the description of the End item as defined on the Non Inventory Item screen.

ContainerKey: This field provides information about the containers used to store the item to be produced.

ContainerNo: This field provides additional information about the containers. A container number is a unique identification assigned to each container.

CntFillLevel: This field provides information about the fill-level for each container.

FillUOM: This field provides information about the fill UOM for the container.

Creating a Mix-Type Batch

1. Open the *Batch Entry* dashboard.
2. Click on the *+Add Batch* button to open the *Batch Entry* screen. If the *Batch Number Entry* window appears, select the *Auto Entry*, *Manual Entry*, or *Batch Series* option for batch number generation.
    a. If you have selected *Batch Series*, use the lookup to select a series to use for this batch.
    b. If you have selected *Manual Entry*, type in your Batch Number.

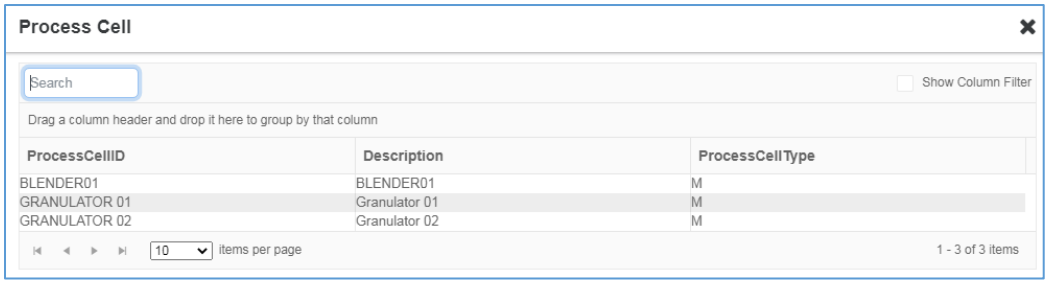
Click the *OK* button to continue.

3. Select the *Mix* option at the *Batch Type* field. A mix-type batch requires you to select a Formula key and restricts the lookup to the available formula keys.

4. When a formula key is selected, certain fields have data defaulted to them. The *Formula Revision No.* field displays the version of the formula that is being used to create this batch. The Start Date is defaulted to the system date and time, which can be changed as per your requirements. The Due Date is also defaulted to the system date, but it can also be modified as needed.

5. Select one of the option *Forward Scheduling*, *Backward Scheduling* or *User defined date* using the dropdown next to the *Scheduling Option* field.

6. Select the process cell associated with this batch via the lookup next to the *Process Cell* field, which implies that batch production shall take place in this process cell. On selecting a formula key the system will default the attached process cell (if process cell is attached with the formula on the Formula Entry screen).



7. When saving a production batch for which a process cell has been assigned, the system will display a warning message if the total batch weight exceeds the process cell capacity.

8. In the *Draw From Location* field, select a particular location from which all your raw materials should be drawn. If you leave this field blank, raw materials would be drawn from the location specified in each line of the formula.

9. In the *Post To Location* field, enter a particular location to which all finished goods produced from this batch will be posted.

10. The read-only *Batch Ticket Printed* checkbox informs you whether or not the Batch Ticket for this batch has been printed. This box is automatically checked after the Batch Ticket has been printed by clicking the *Print* button available on the *Batch Entry* dashboard. It remains

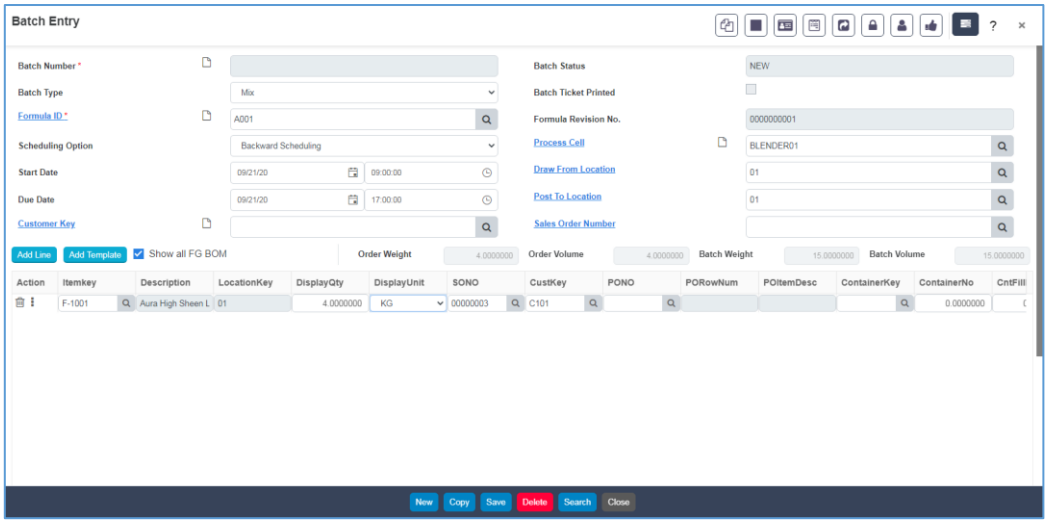
unchecked otherwise. If the Batch Ticket is printed again, the message ‘REPRINT’ will be displayed on it.

11. To create this batch for a specific customer or to meet the demand of a particular sales order, select that customer and/or sales order using the *Customer key* and *Sales Order Number* fields, respectively. These values are defaulted to the grid when an end item is selected, and can be changed if the need arises.

12. Click the *Add Line* button to add a new line in the grid. The Item Key lookup displays all Released BOMs for finished goods and intermediates that use the selected Formula ID. The lookup in this grid can be extended by selecting the *Show All FG BOM* checkbox. This function displays all the Released BOMs for finished goods that use any formula.

13. Select the item you wish to produce. A line is inserted in the grid.

14. Enter the quantity you wish to produce in the *Display Qty* field. BatchMaster WEB will immediately calculate the Order Weight and Batch Weight display them in their respective fields. Here, the Order Weight is the total order weight calculated on the basis of the order quantities of all end items specified in the grid. The Batch Weight is the quantity of formula required to produce the Order Weight, taking into consideration any losses assigned to the formula.



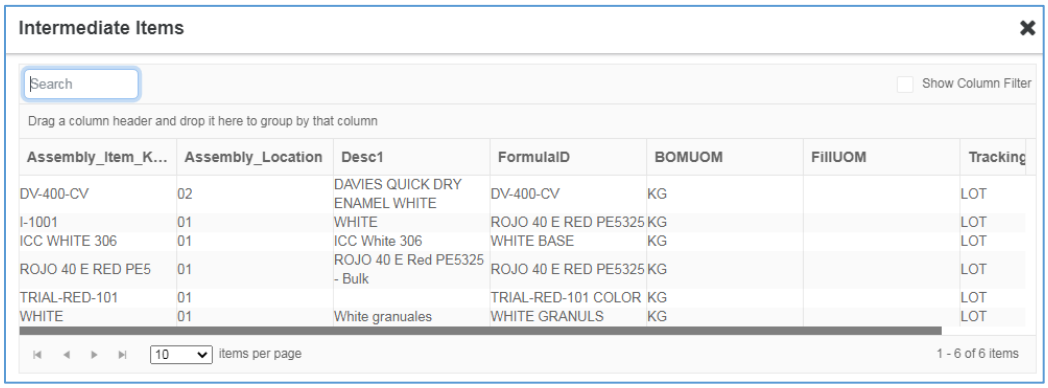
15. Click the *Save* button to save the record.

16. If the *Create Batch with Released Status* option was not selected at the *Production Setup* screen, click the *Release* button under the special functions to release the batch for further processing, or have the appropriate person do this.

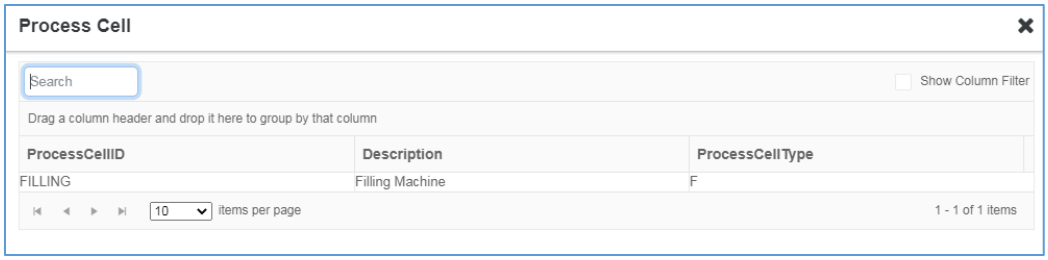
17. You may also print a Batch Ticket for use by the staff on the factory floor by clicking the *Print* option available on the *Batch Entry* dashboard.

Creating a Fill-Type Batch

1. Open the *Batch Entry* dashboard.
2. Click on the *+Add Batch* button to open the *Batch Entry* screen.
3. If the *Batch Number Entry* window appears, select the *Auto Entry*, *Manual Entry*, or *Batch Series* option for batch number generation. Type a Batch Number or select a Batch Series if those options have been selected. Click *OK* to continue.
18. Select the *Fill* option in the *Batch Type* field. A fill-type batch requires you to select an Intermediate key and restricts the lookup to the available intermediates.



19. When you select an Intermediate key, its location is automatically defaulted.
20. For *Backward* scheduling, when routing is implemented the Start Date is automatically calculated by the system based on the Due Date you enter and the formula lead time. In the case of *Forward* scheduling, when routing is implemented the Due Date is automatically calculated by the system based on the Start Date you enter and the formula lead time.
21. Select the process cell associated with this batch via the lookup next to the *Process Cell* field, which implies that the production of this batch shall take place in this process cell.



22. When saving a production batch for which a process cell has been assigned, the system will display a warning message if the total batch weight would exceed the process cell capacity.

23. Use the *Draw from Location* field to select a particular location from which you wish to draw all your raw materials. If you leave this field blank, raw materials would be drawn from the location specified in each line of the formula.

24. In the *Post To Location* field, select a particular location to which all your finished goods produced from this batch would be posted.

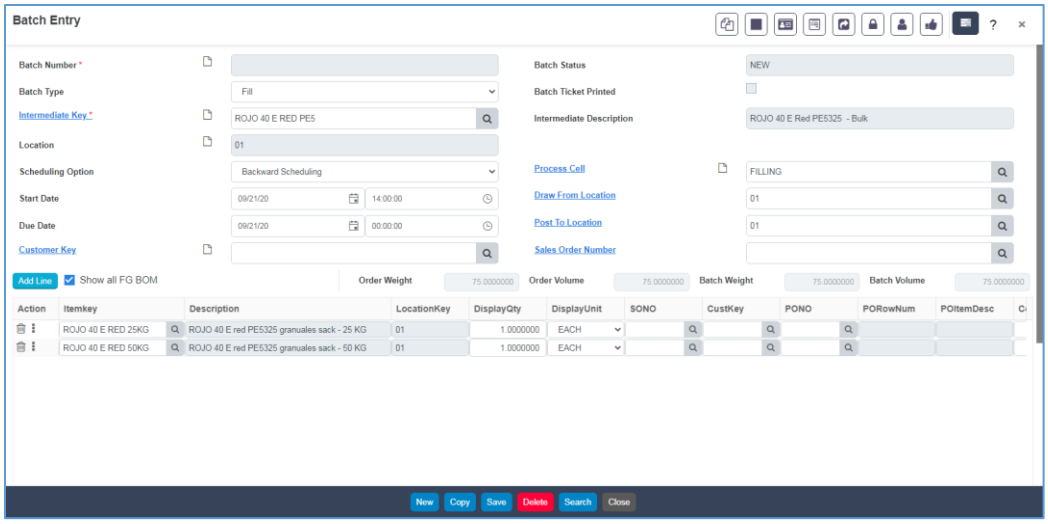
25. The read-only *Print Batch Ticket* checkbox informs you whether or not the Batch Ticket for this batch has been printed. This box is automatically checked after the Batch Ticket has been printed by clicking on the *Print* button available on the *Batch Entry* dashboard. It remains unchecked otherwise. If the Batch Ticket is printed again, the message 'REPRINT' would be displayed on it.

26. If you wish to create this batch for a specific customer or to meet the demand of a particular sales order, then select that customer and sales order using the *Customer key* and *Sales Order Number* fields, respectively. These values are defaulted to the grid fields when an end item is selected, and can be changed if the need arises.

27. Click in the *Add Line* button to insert a new line in the grid.

28. Click on the *Item Key* lookup displaying all Released BOMs for finished goods that use the formula associated with the selected Intermediate key. This lookup can be extended by selecting the *Show All FG BOM* checkbox. This function displays all the Released BOMs for finished goods that use any formula.

29. Enter the quantity you wish to produce in the *DisplayQty* field. BatchMaster WEB will immediately calculate the Order Weight and Batch Weight and display them in their respective fields. Here, the Order Weight is the total order weight calculated on the basis of the order quantities of all end items specified at the grid. The Batch Weight is the quantity of formula required to produce the Order Weight, taking into consideration any losses assigned to the formula.



30. Click the *Save* button to save the record.

31. If the *Create Batch with Released Status* option was not selected at the *Production Setup* screen, click on the *Release* button to release the batch for further processing.

Creating an Assembly-Type Batch

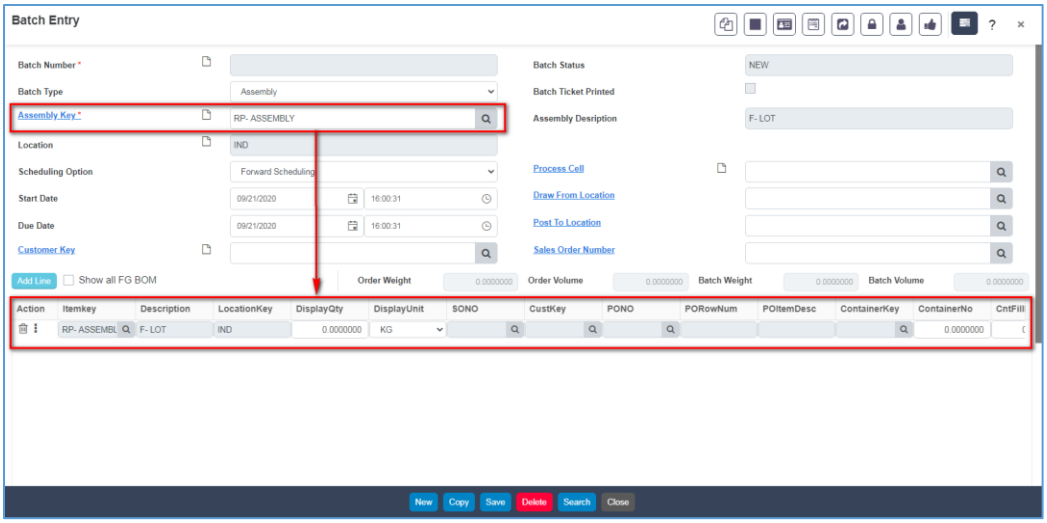
1. Open the *Batch Entry* dashboard.

2. Click on the *+Add Batch* button to open the *Batch Entry* screen.

3. If the *Batch Number Entry* screen appears, select the *Auto Entry*, *Manual Entry*, or *Batch Series* option for the batch number generation. Type a Batch Number or select a Batch Series if those options have been selected. Click *OK* to continue.

4. Select the *Assembly* option in the *Batch Type* field. An assembly-type batch requires you to select an Assembly key and restricts the lookup to the available BOM components.

5. When you select an Assembly key, a line for the associated finished good is automatically inserted in the grid.



6. For *Backward* scheduling, when routing is implemented the system automatically calculates the Start Date based on the Due Date you enter and the formula lead time. In the case of *Forward* scheduling, when routing is implemented the system automatically calculates the Due Date based on the Start Date you enter and the formula lead time.

7. Select the process cell associated with this batch via the lookup next to the *Process Cell* field, which implies that the production of this batch shall take place in this process cell. When saving a production batch for which a process cell has been assigned, the system will display a warning message if the total batch weight would exceed the process cell capacity.

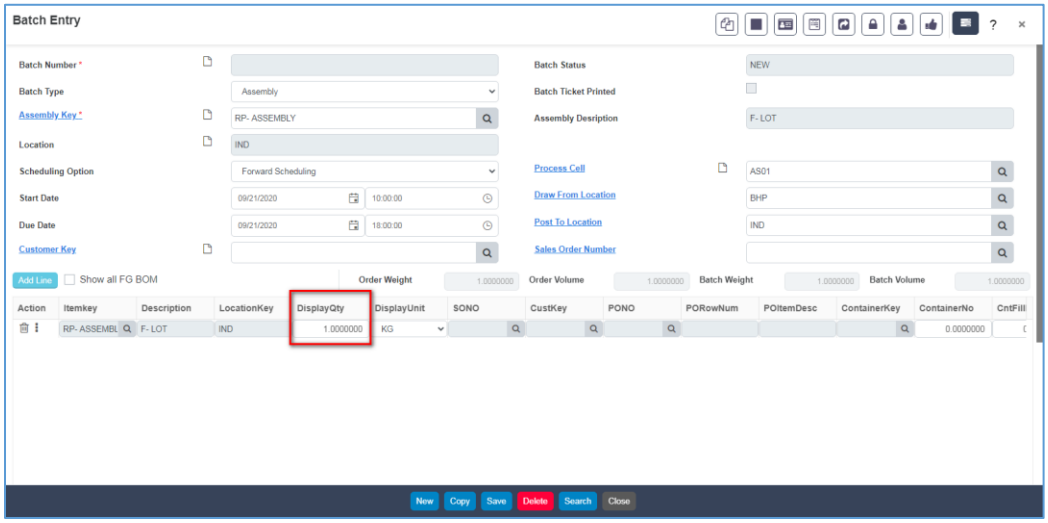
8. In the *Draw from Location* field, select a particular location from which you wish to draw all your raw materials. If you leave this field blank, raw materials would be drawn from the location specified in each line of the formula.

9. In the *Post To Location* field, select a particular location to which all finished goods produced from this batch would be posted.

10. The read-only *Print Batch Ticket* checkbox informs you whether or not the Batch Ticket for this batch has been printed. This box is automatically checked after the Batch Ticket has been printed by clicking the *Print* button available on the *Batch Entry* dashboard. It remains unchecked otherwise. If the Batch Ticket is printed again, the message 'REPRINT' would be displayed on it.

11. If you wish to create this batch for a specific customer or to meet the demand of a particular sales order, then select that customer and sales order using the *Customer key* and *Sales Order Number* fields, respectively. These values are defaulted in the grid when an end item is selected, and can be changed if necessary.

12. Enter the quantity you wish to produce in the *DisplayQty* field. BatchMaster WEB does not consider the Batch Weight for an assembly-type batch.



13. Click the *Save* button to save the record.

14. If the *Create Batch with Released Status* option was not selected on the *Production Setup* screen, click the *Release* button under the special functions to release the batch for further processing.

Creating a Batch with SO Lines

In Batch Entry you have the provision to choose a sales order item against which the production order needs to be generated, provided a formula is defined and the BOM is released for that item. Follow the steps below to do so.

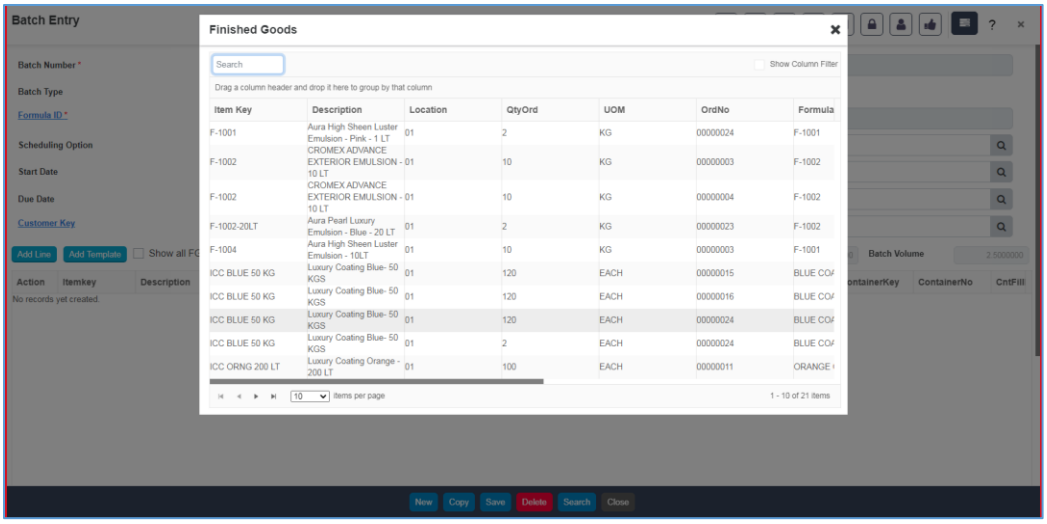
1. Open the *Batch Entry* dashboard.

2. Click on the *+Add Batch* button to open the *Batch Entry* screen.

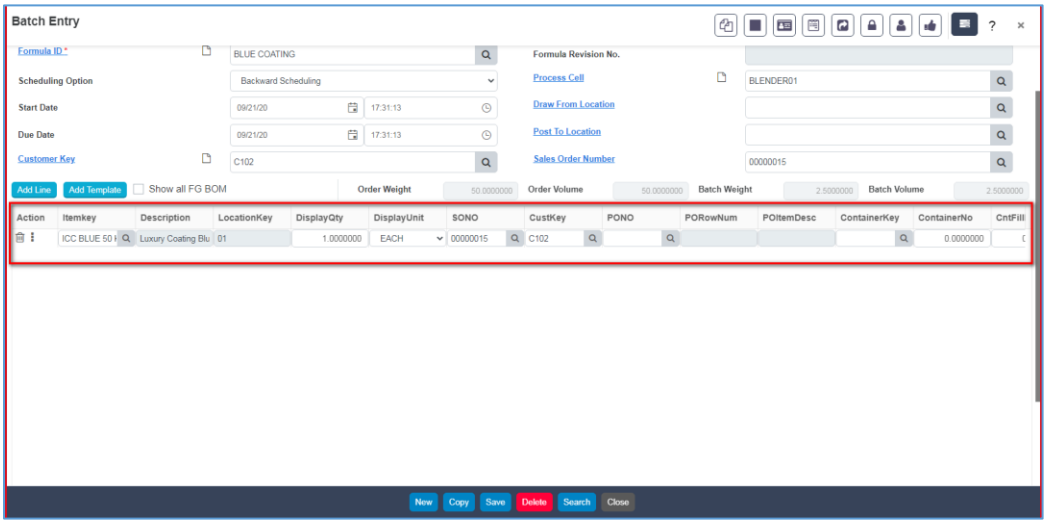
3. If the *Batch Number Entry* window appears, select the *Auto Entry*, *Manual Entry*, or *Batch Series* option for the batch number generation.

4. Select the *Generate Batch by SO* option from the *Special Functions* menu.

5. On the window that is displayed, select the *End Item* line you need to produce.



6. The line is inserted in the grid with the value in the *DisplayQty* field the same as the Order Quantity of the SO line. The *Customer Key* and *Sales Order Number* fields are automatically filled with the associated customer key and sales order number, respectively.



7. Click on the *Save* button to save the record.

Creating a Disassembly Batch

1. Open the *Batch Entry* dashboard.

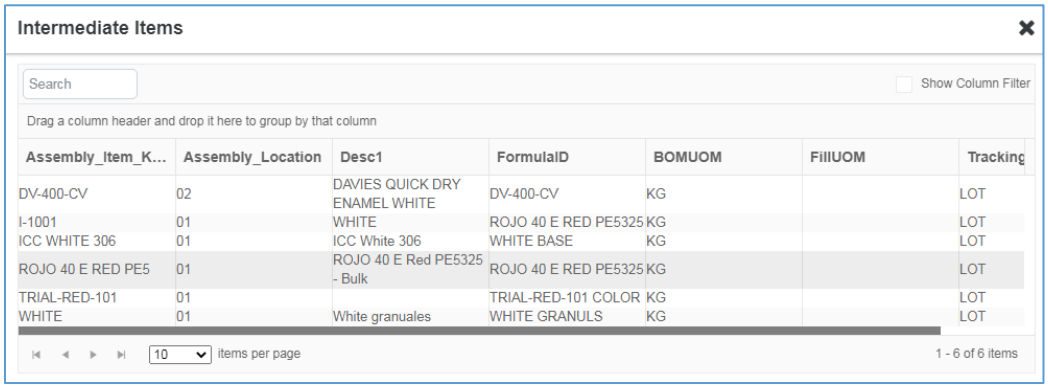
2. Click on the *+Add Batch* button to open the *Batch Entry* screen.

3. To create a new Disassembly Batch, the application will prompt for auto-generation of the batch number. Select the *Auto* option to let BatchMaster WEB automatically generate the batch

number, *Manual* to enter the batch number of your choice, or *Batch Series* to differentiate the batches.

4. Select the *Disassembly* option in the *Batch Type* field. A Disassembly-type batch requires you to select an Intermediate key and restricts the lookup to the available intermediates.

5. Use the lookup next to the *Intermediate Key* field to select the Intermediate that is to be disassembled.

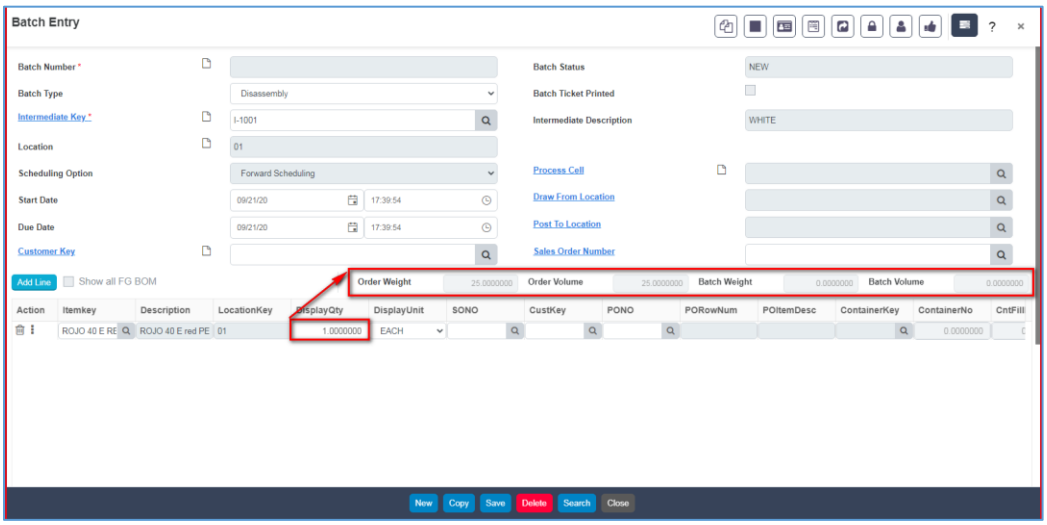


6. Click on the *Add Line* button to select the End Item that needs to be disassembled. All the finished goods that are produced using the selected Intermediate key are displayed.

7. Enter the appropriate value in the *Order Quantity* field.

8. Specify the finished Goods using the lookup next to the *ItemKey* field.

9. Enter the finished good quantity in the *DisplayQty* field. BatchMaster WEB will calculate the order weight and volume, and default them in their respective fields.



Batch weight and batch volume are not considered for a Disassembly Batch in BatchMaster WEB.

10. Add more disassembly items, if desired.

11. Click the *Save* button to save the batch. If the *Create Batches with Release Status* checkbox is not selected on the *Production Setup* screen, then you would need to manually release the batch using the *Release* button under the special functions.

Creating a Rework Type Batch (Rework by Batch)

1. Open the *Batch Entry* dashboard.

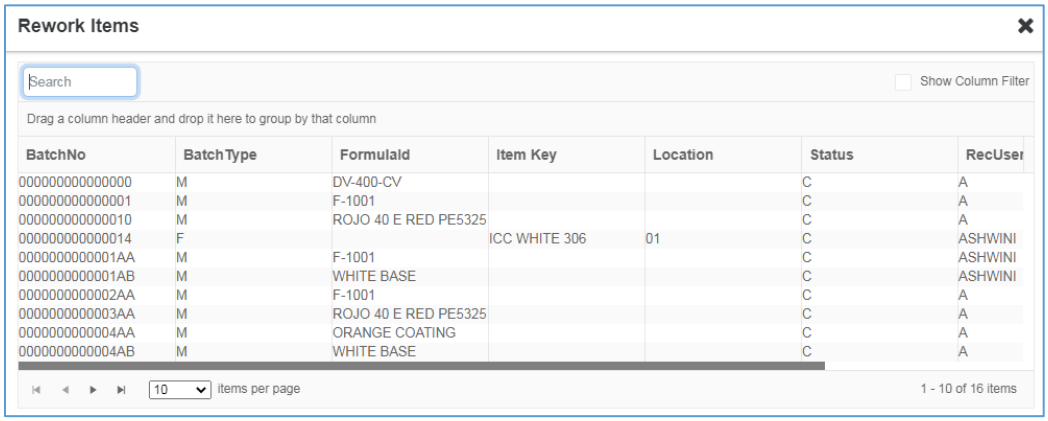
2. Click on the *+Add Batch* button to open the *Batch Entry* screen.

3. If the *Batch Number Entry* window appears, select the *Auto Entry*, *Manual Entry*, or *Batch Series* option for the batch number generation.

4. Select *Rework* option in the *Batch Type* field to create a new rework batch.

5. Select the *Batch No.* option in the *Rework by* field. Selecting the *Batch No.* option will deactivate the *Add Line* button in the grid. The *Delete Line* stays active in case you are going to rework into a different end item.

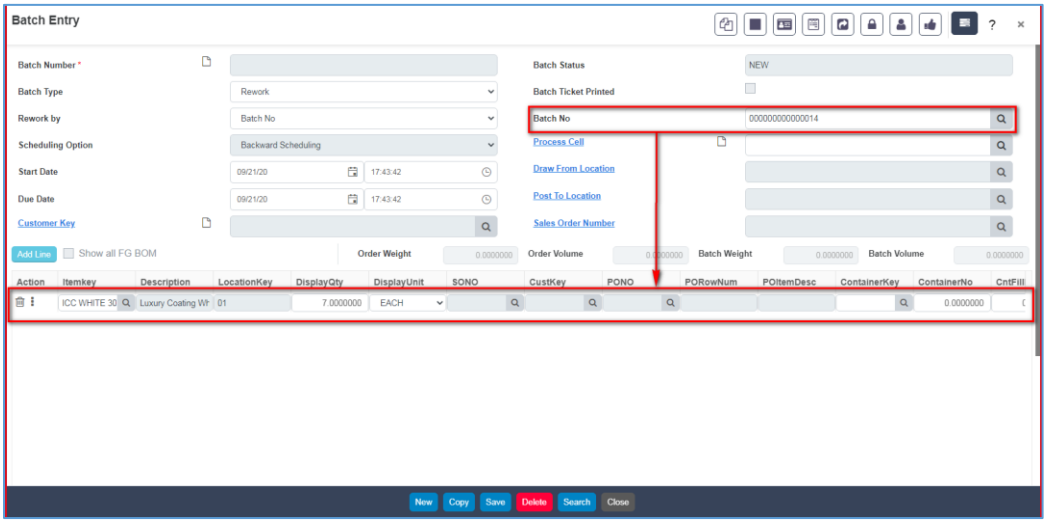
6. Specify the rework batch using the lookup next to the *Batch No* field. The system restricts the lookup to the available closed and partially closed batches.



7. You are creating a new batch for rework, so the batch status is New.

When the *Create Batch with Released Status* option is selected at the *Production Setup* screen, the system creates a released batch upon saving the record.

8. When you select a batch number, data will be defaulted to certain fields in the grid. For example, the *Item Key* field displays the end items of the batch that have been created, and the *Description* field displays the description associated with each Itemkey, Locationkey, Display Qty, and DisplayUnit.



9. The *Start Date* is defaulted to the system date and time, which can be changed if required. Initially, the *Due Date* also defaults to the system date, but this can also be modified.

10. When routing is implemented, the system automatically calculates the start date for *Backward* scheduling based on the due date you have entered and the formula lead time. When routing is implemented for *Forward* scheduling, the system automatically calculates the due date based on the start date entered and the formula lead time.

11. Select the process cell associated with the batch via the lookup next to the *Process Cell* field, to establish that batch production will take place in this process cell. When saving a rework production batch with a process cell assigned, the system will display a warning message if the total batch weight would exceed the process cell capacity.

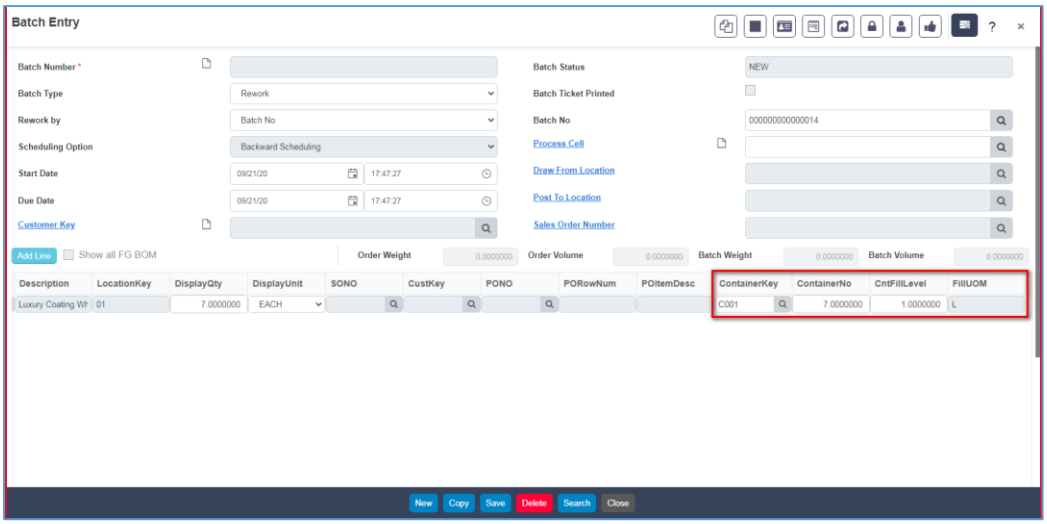
12. The read-only *Batch Ticket Printed* checkbox makes it easy to see whether or not the Batch Ticket for this batch has been printed. This box is checked after the Batch Ticket has been printed by clicking the *Print* button available on the *Batch Entry* dashboard; it remains unchecked otherwise. If the Batch Ticket is printed again, it would have the message 'REPRINT' printed on it.

13. When routing is implemented and a process cell is defined, selecting the *User Defined* option restricts BatchMaster WEB from changing the start date with regards to routing. If this box is not

checked, the system would automatically calculate the start date based on the due date and lead time.

14. The *DisplayQty* field displays the quantity produced in the original batch. You can change the quantity you wish to produce in the *DisplayQty* field, if required. The system will immediately calculate the order weight and batch weight and display them in their respective fields. Here, the order weight is the total order weight calculated on the basis of the order quantities of all the end items specified in the grid, and the batch weight is the quantity of formula required to produce the order weight, taking into consideration any losses assigned to the formula.

15. Select the container key by entering the appropriate value in the *ContainerKey* field. The system will display the container number, container fill level, and fill UOM in their respective fields. It will also tell you how many containers you need in the *ContainerNo* field.



16. Click the *Save* button to save the record.

If the *Create Batch with Released Status* option was not selected at the *Production Setup* screen, click the *Release* button under the special functions to release the batch for further processing, or have the appropriate person do this.

Creating a Rework-Type Batch (Rework by Finished Good)

1. Open the *Batch Entry* dashboard.

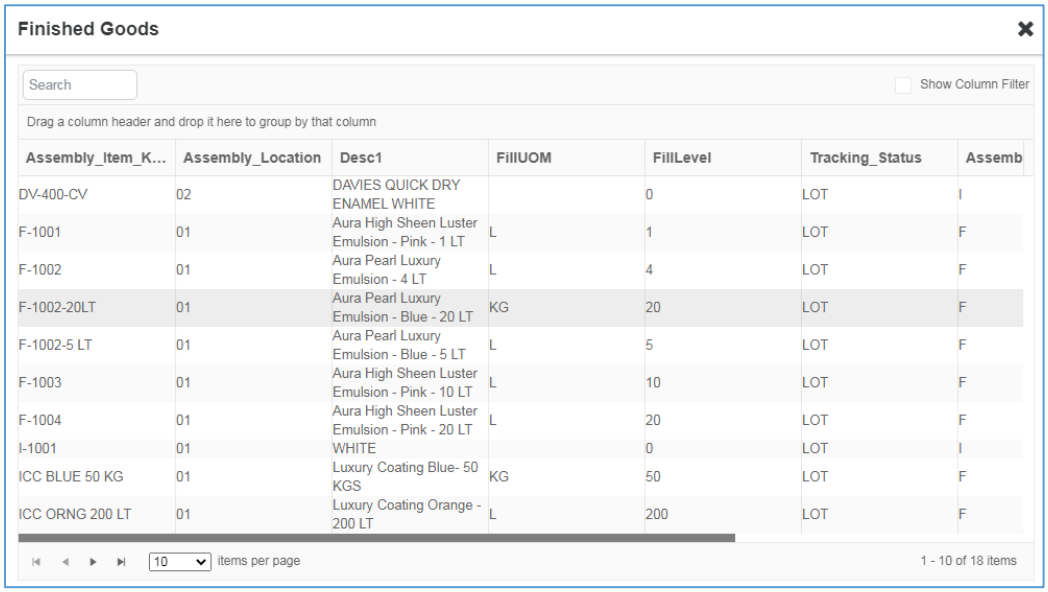
2. Click on the *+Add Batch* button to open the *Batch Entry* screen.

3. If the *Batch Number Entry* window appears, select the *Auto Entry*, *Manual Entry*, or *Batch Series* option for the batch number generation.

4. Select *Rework* option in the *Batch Type* field to create a new rework batch.

5. Select the *Finished Good* option in the *Rework By* field. This action deactivates the *Batch No* field and activates the *Add Line* button. Select the end item for rework in the grid.

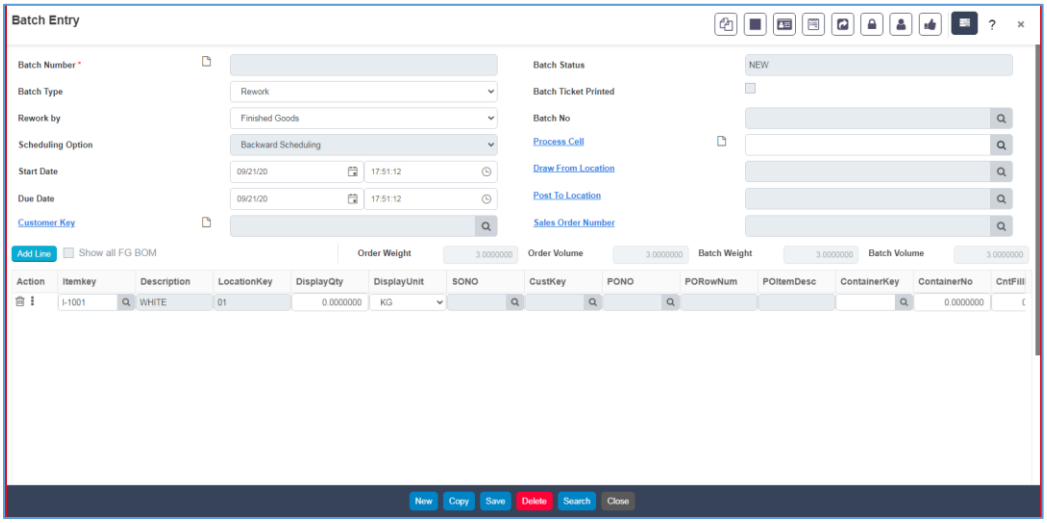
6. When you choose the *Rework By* option, you are required to select the finished good Item using the lookup next to the *Itemkey* field. The system restricts the lookup to the available *Finished Good* items.



7. You are creating a new batch for rework, so the batch status is New.

When the *Create Batch with Released Status* option is selected at the *Production Setup* screen, the system creates a Released batch upon saving the record.

8. When you select an item, data will be defaulted to certain fields in the grid (e.g., the *Description* field will display the *Description* associated with the *Itemkey, Locationkey*, and *DisplayUnit*).



9. The start date is defaulted to the system date and time, which can be changed as required. Initially, the due date is also defaulted to the system date, but it can also be modified.

When routing is implemented, the system automatically calculates the start date for *Backward* scheduling based on the due date you have entered and the formula lead time. In the case of *Forward* scheduling, the system automatically calculates the due date based on the start date entered and the formula lead time.

10. Select the process cell associated with this batch via the lookup next to the *Process Cell* field, which implies that production of this batch shall take place in this process cell. When saving a rework production batch to which a process cell has been assigned, the system will display a warning message if the total batch weight exceeds the process cell capacity.

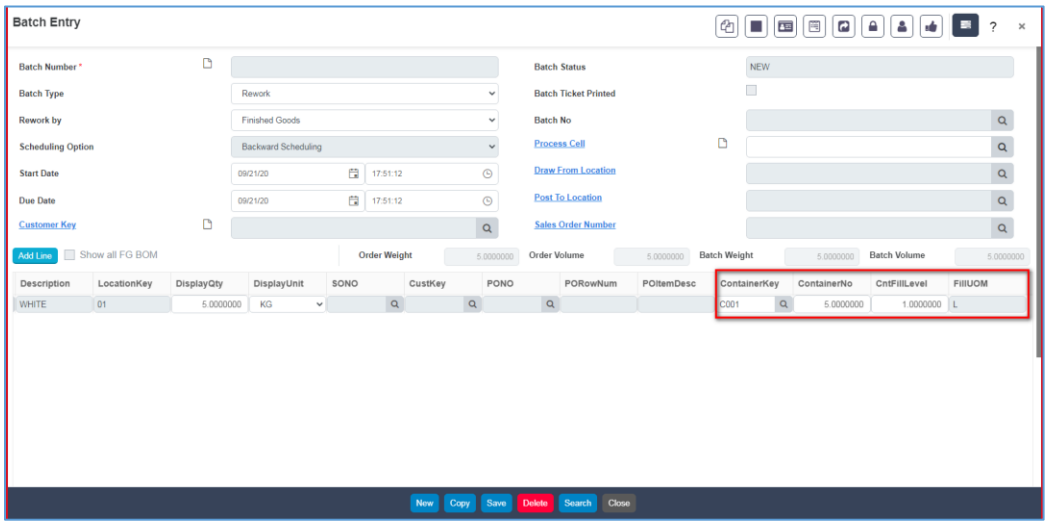
11. The read-only *Print Batch Ticket* checkbox makes it easy to see whether or not the Batch Ticket for this batch has been printed. This box is checked after the Batch Ticket has been printed by clicking the *Print* button available on the *Batch Entry* dashboard; it remains unchecked otherwise. If the Batch Ticket is printed again, it would have the message ‘REPRINT’ printed on it.

12. When routing is implemented and a process cell is defined, selecting the *User Defined* option restricts BatchMaster WEB from changing the start date with regards to routing. If this box is not checked, the system would automatically calculate the start date based on the due date and lead time.

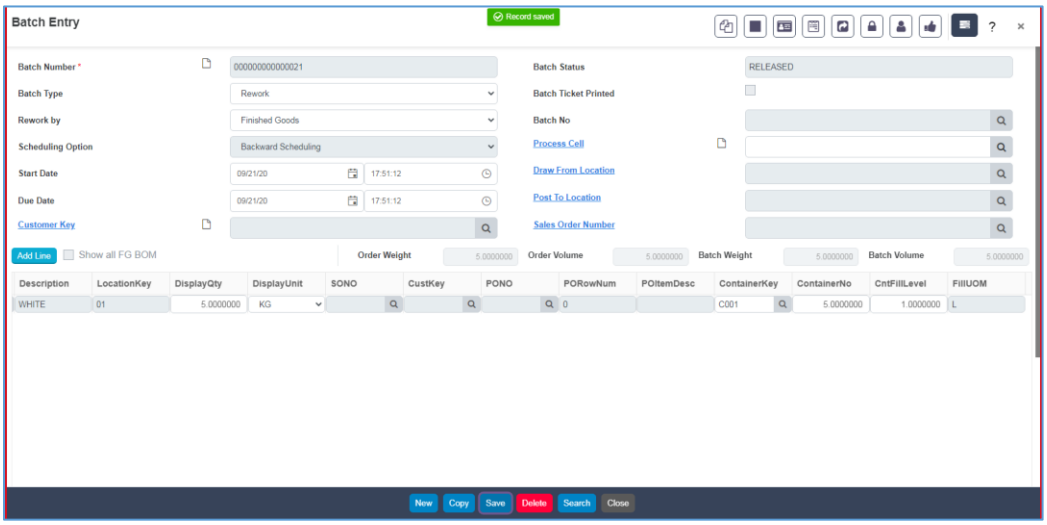
13. Enter the quantity you wish to rework in the *DisplayQty* field. BatchMaster WEB will immediately calculate the order weight and batch weight and display them in their respective fields. The order weight is the total order weight calculated from the order quantities of all the end items specified in the *End Items* grid, and the batch weight is the quantity of formula required to produce the order weight, taking into consideration any losses assigned to the formula.

⚠ **Prerequisite:** The Quantity On Hand must be equal to or greater than the quantity you wish to rework.

14. Select the container by entering the appropriate value in the *Container Key* field. The system will display the ContainerNo, CntFill Level, and FillUOM in their respective fields.



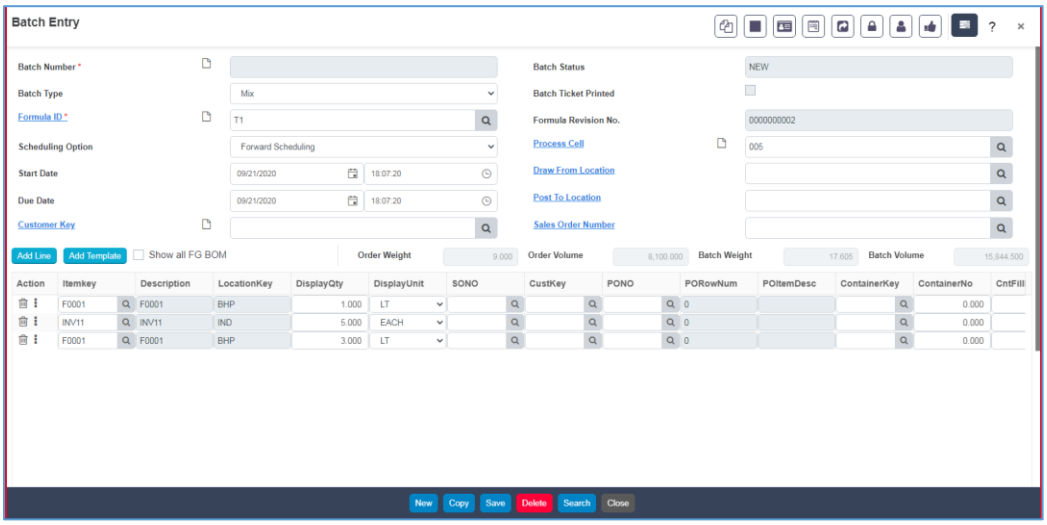
15. Click the *Save* button to save the record.



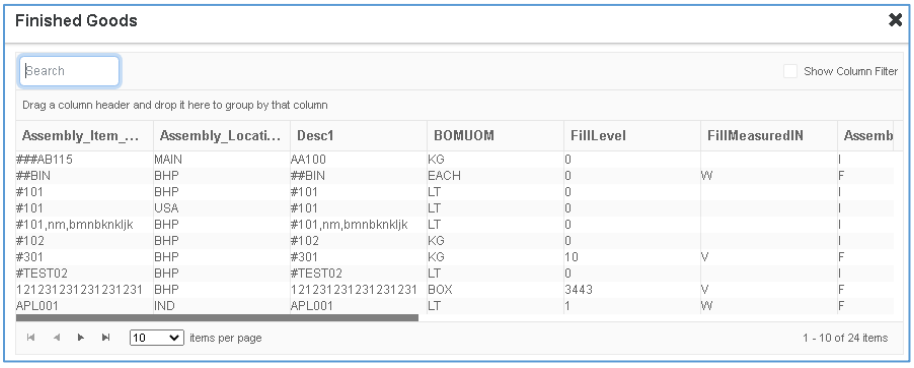
If the *Create Batch with Released Status* option was not selected at the *Production Setup* screen, click the *Release* button under the special function to release the batch for further processing, or have the appropriate person do this.

Special Function

Select Batch To Copy: Clicking this button displays the *Select batch To Copy* window. Listing all the batches created in the database. Select the batch that needs to be copied. Consequently, the system defaults the respective fields in the screen.



Show Finished Goods: This button becomes enabled only for a 'Mix' type batch. Clicking this button opens a lookup window that displays all the Released BOM's of Finished Good type as well Intermediate Type.



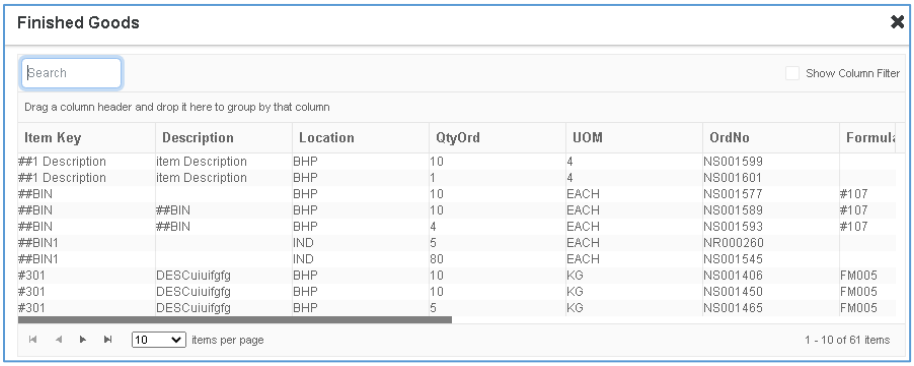
Selecting a finished good defaults the associated formula to the *Formula ID* field and the selected finished good to the 'End Item' grid. Whereas selecting an Intermediate defaults the associated formula to the Formula ID field and the selected Intermediate to the 'End Item' grid.

Generate Batch by SO: This button provides capability to create production batch against the Sales Order. When performing the Batch Entry user gets the provision to choose the sales order item against which the production order needs to be generated.

Hence, user can refer the Sales Order item for the production batch for which Formula is defined and the Bill of Material is released.

Using it, user can fetch the desired finished good item on the basis of Sales Order number.

On clicking the *Generate Batch by SO* button a window prompts where user can view all FG items with respect to the available Sales Order. User can choose the desired order for which production batch needs to be generated.



On choosing the appropriate Sales Order number, system would fetch only the new FG lines along with the order quantity.

Process Cell Load Planning: Clicking this button displays the Process Cell Allocation window. It provides user with a way to view the allocation for the process cell associated with the batch against a week or day. You can adjust the schedule of batch for the specific process cell.

Goto Batch Ticket: Clicking this button displays this batch on the 'Batch Ticket' screen only if the Batch Status is *RELEASE*. If the Status is New user needs to release the Batch using the Release button present on the special functions.

Goto Batch Close: Clicking this button displays this batch on the 'Batch Close' screen.

Goto Labor Transaction: Clicking this button displays this batch on the 'Labor Transactions' screen. For this the Process Cell must be defined for this batch entry. Before clicking this button, Routing should be implemented.

Release: This button is applicable only when the 'Create Batches with Released Status' is kept unchecked at the Production Setup. Clicking on this button would releases the newly created batch and sets the Batch Status as 'Released'. The batch having Release status is displayed at the

Batch Ticket screen, where user can perform a number of operations as of allocate, issue, modify the BOM line items etc. Once released user is not allowed to make any changes on the Batch Entry Screen.