



Dynamics 365 - Demand Management and Inventory Shortage

Revision 1



Revision History

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1 About User Manual

This document describes the step-by-step guide for creation of a production order (PRO) of a product. These production orders (PROs) are typically created by orderer in a legal entity (legal organization). The production order includes information about the items or products that will be produced, the size of production, and the planned delivery date. It also comprises information about which resources to use and which procedure to follow to produce the items. A production order passes through different stages of the life cycle.

In this manual, the procedure of creating production order and information regarding inventory will be briefed out.

1.1 Dynamics 365 Finance and Operations

To access and to perform different operations, the login credential (Login ID, Password), along with, the web link of Microsoft Dynamics 365 for Finance and Operations are provided by the legal entity (organization).

After logging in, the user will see the main dashboard, which includes the grid of individual Workspaces like Purchase Order Preparation, Master Planning, Cost Analysis etc. which are represented in the **Figure 1**.

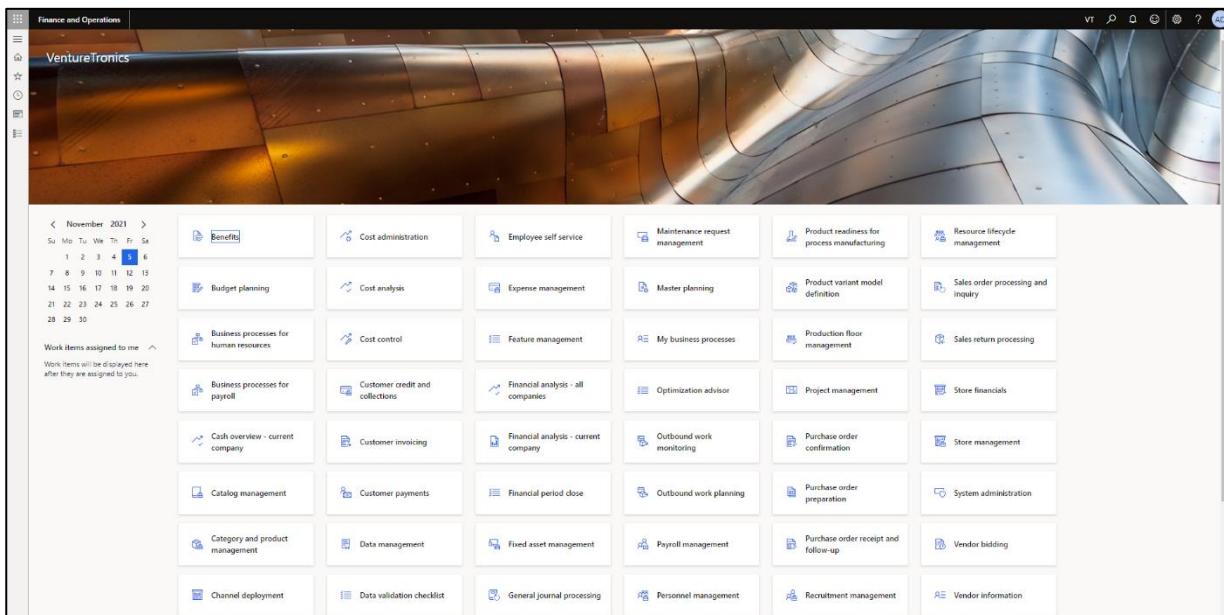


Figure 1 Dynamics 365 main Dashboard

2 Production Order

The way to access the production order (PRO) module, especially, for creating a new Production and for getting the summarized and detailed information of all PROs in the Microsoft Dynamics 365 for Finance and Operations application.

Navigate to the top left corner of main dashboard and select ‘Expand Navigation Pane’. Upon clicking, the sliding panel composing of different options will appear.

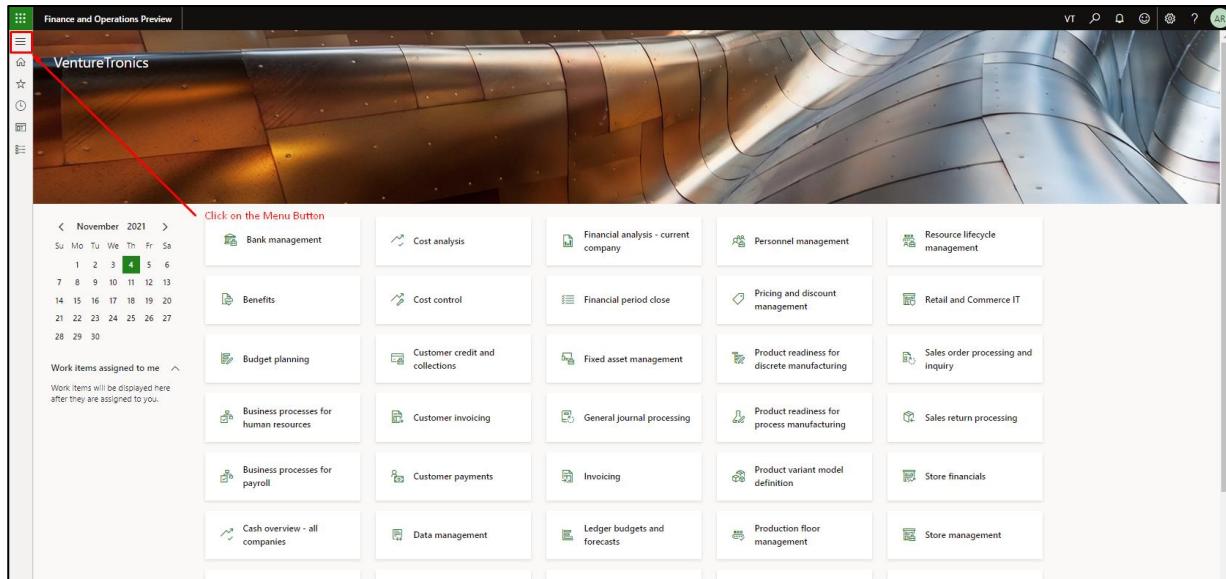


Figure 2 Click on the Expand Navigation Pane'

Different options will appear when you click on the modules.

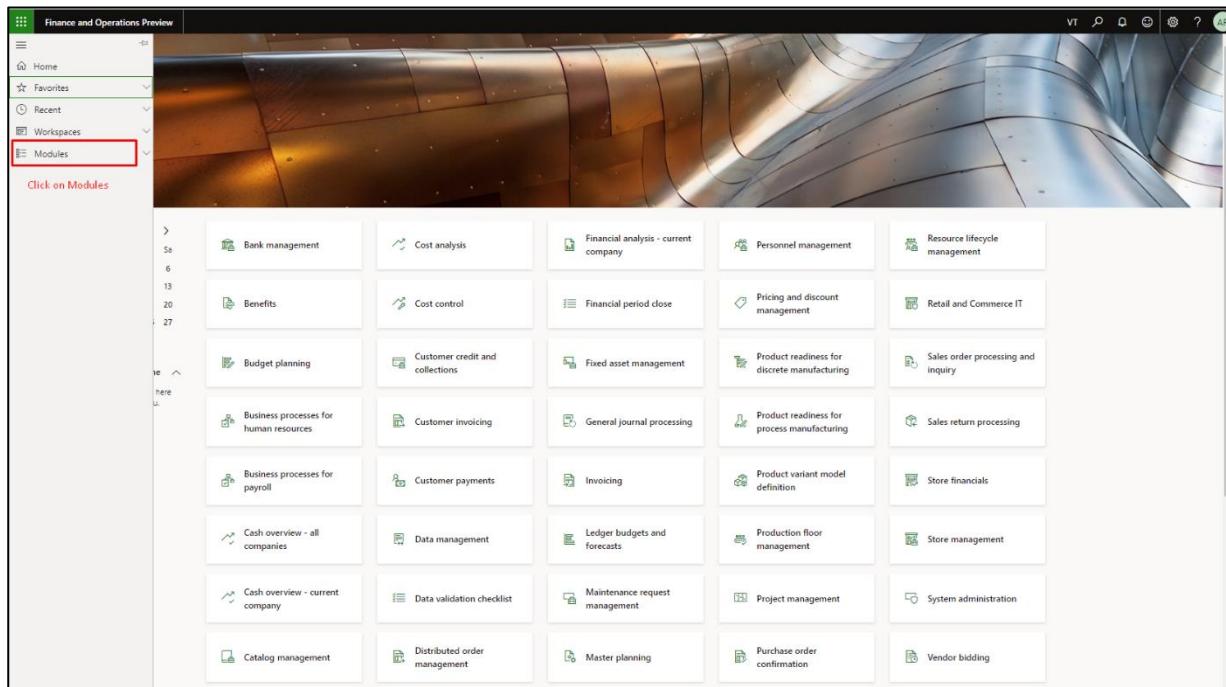


Figure 3 Expand the 'Modules' option

Scroll down and select production control. After selecting production control option, the sub-options relating to your selection will appear. Expand the Production order and choose ‘All production orders. By clicking, production order page will appear.

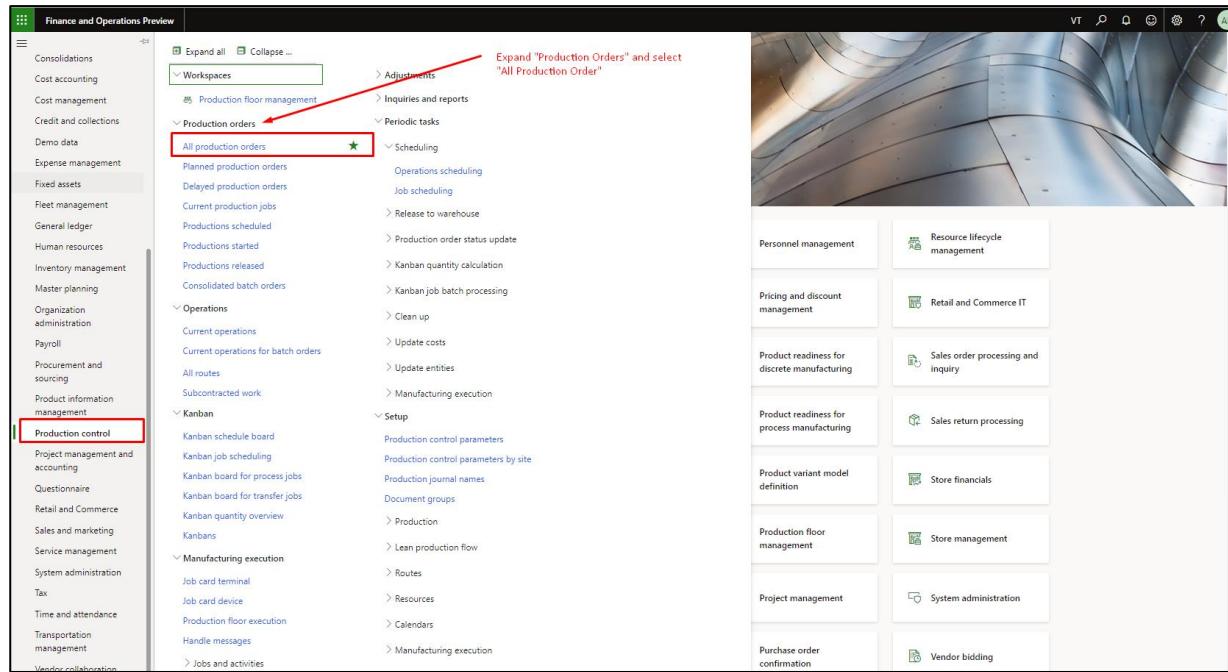


Figure 4 Select the Production control' and click 'All production orders'

2.1 Production Order List

The production of items, goes through a process known as life cycle of production. In this life cycle, specific steps are needed to follow for the production criteria. The life cycle starts with the production order creation. The life cycle terminates with a finished or completely manufactured item that is ready for customer delivery or ready for another phase of production. A single production order is composed of number of assemblies. In production order life cycle, there is a possibility of inventory shortage which can cause delay in production. The information regarding inventory shortage will also be discussed in this manual.

Here is guide for creation of a new production order (PO), which is given below:

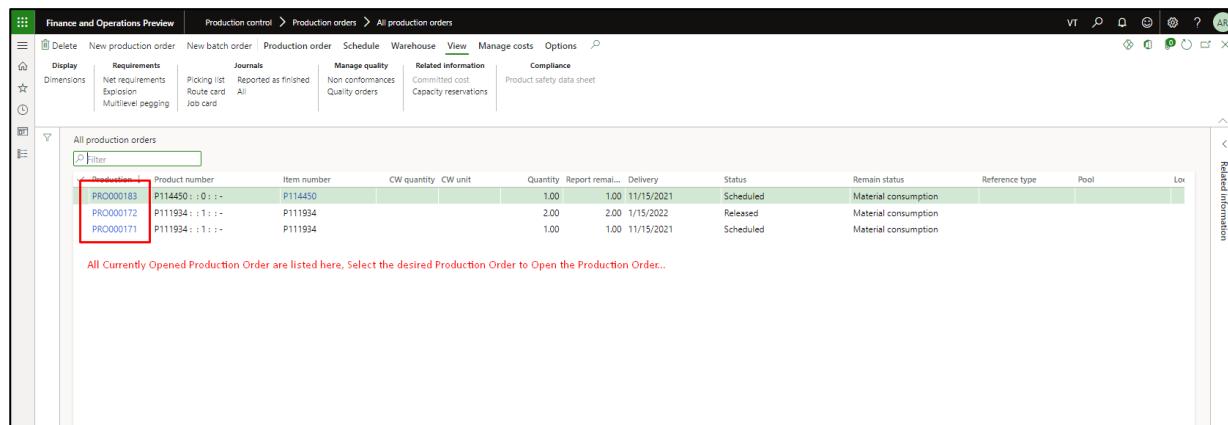


Figure 5 Production Order Workspace

2.2 New Production Order

For creating new production order, click on the production order button available on the top of toolbar. Upon clicking, a window containing different fields will appear from the right.

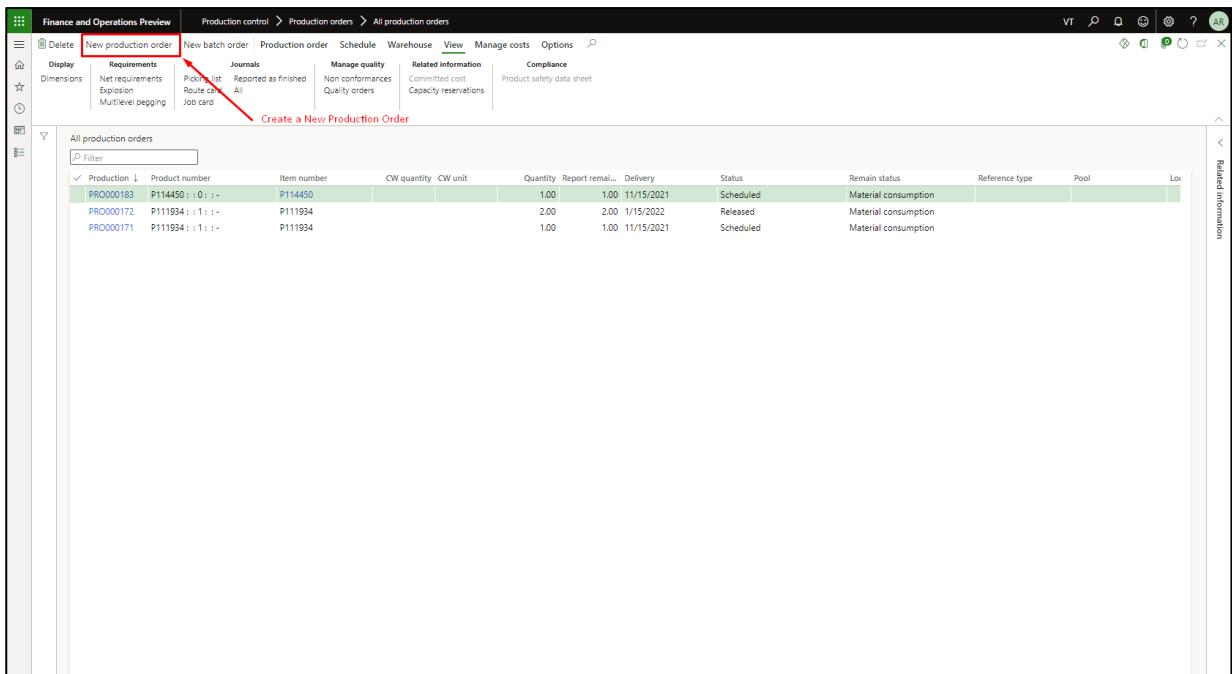


Figure 6. Select New Production Order' available on top

2.3 New Production Order Data

Enter the details in the fields for creating production order. Some fields will automatically be filled like Production ID etc. This process is already highlighted in the **Figure 7**.

IDENTIFICATION	Site
Production PRO000456	VT-LHR
Warehouse	VT-LHRArena
Item number	P117025-02
Name	ASSEMBLY, SMARTVALVE 10...
Location	PCO Hall
PRODUCTION	
Configuration Number	SV1039320R010_
Quantity	1.00
Delivery	10/20/2022
INVENTORY DIMENSIONS	
Rev	6
BOM	
Dev	1
Create Cancel	

Figure 7 Add details to create production Order

2.4 Calculate Production Order

If you want to calculate the Batch Job of the production order, click on the “Calculate Purchase Order” tab (from purchase order). The user will be able to see the detail pop to calculate the shortage batch job. The need to fill the data as per requirement to calculate job then click on “OK” to submit the calculation. As the user press the “Yes” then user will be able to see the detail pop to fill the data as per requirement to calculate job then click on “OK” to submit the calculation which is also highlighted in the **Figure 9 and 10**. User then will move to operation scheduling to select the date and limitations to calculate the batch job which is also highlighted in the **Figure 11**. If another job is in the Queue then user will receive the message to wait until its completed other user will receive the success message. which is also highlighted in the **Figure 12 and 13**. If the user receives the success message then can check its operation in batch job to check its status. Batch job have different status like waiting, error and ending.

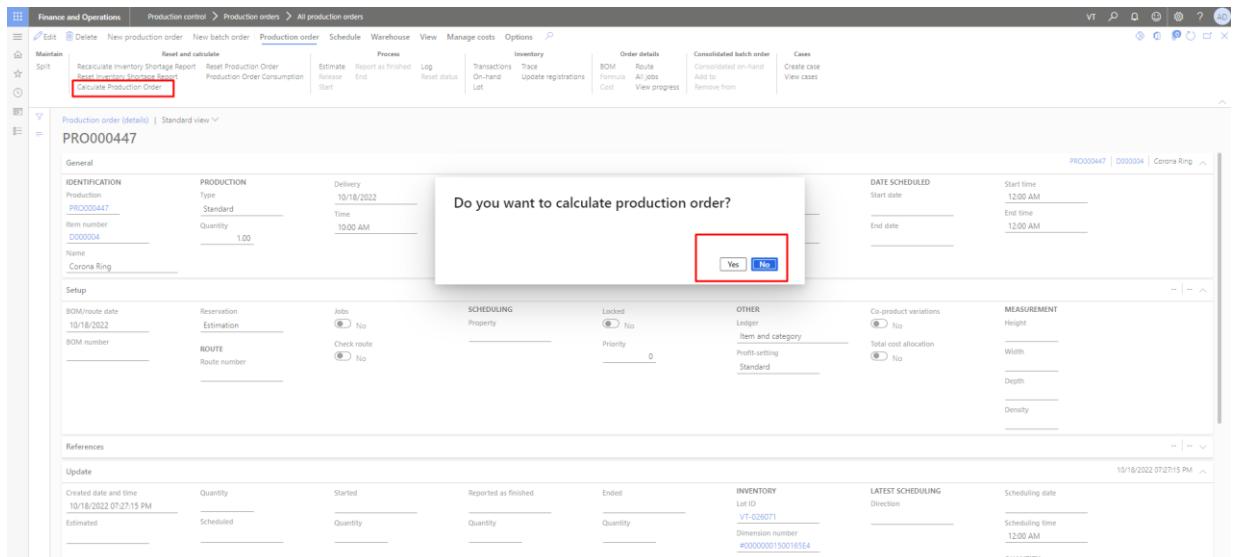


Figure 8 Calculate Production Order

The user will estimate the production order and it can be calculated after created the production order.

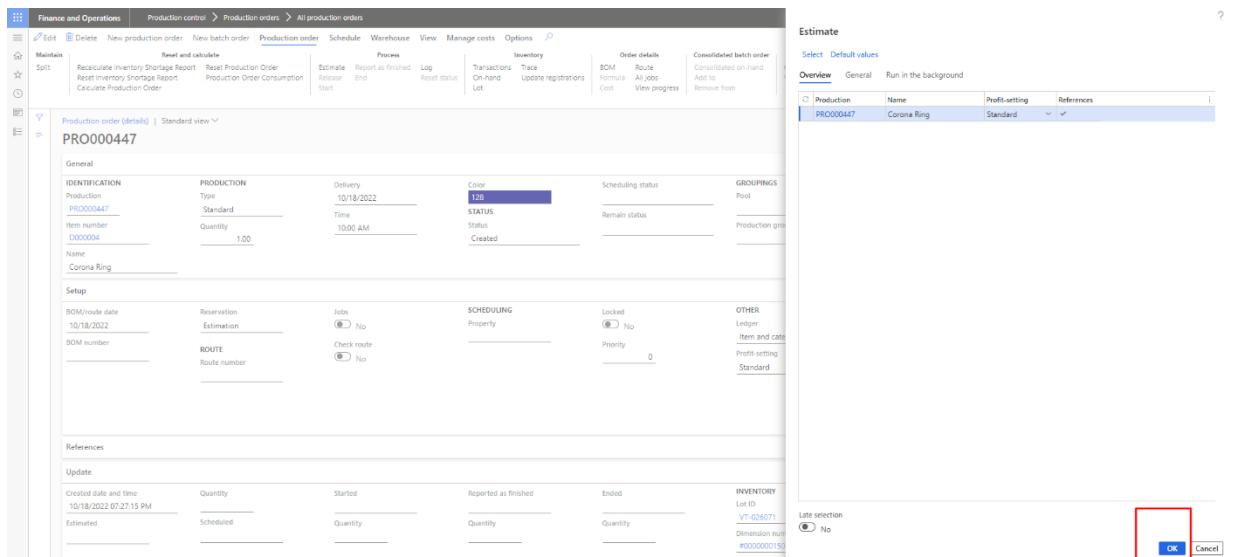


Figure 9 Confirm and press OK to Estimate Production Order

The user will perform the operation scheduling of the production order by filling the scheduling parameters.

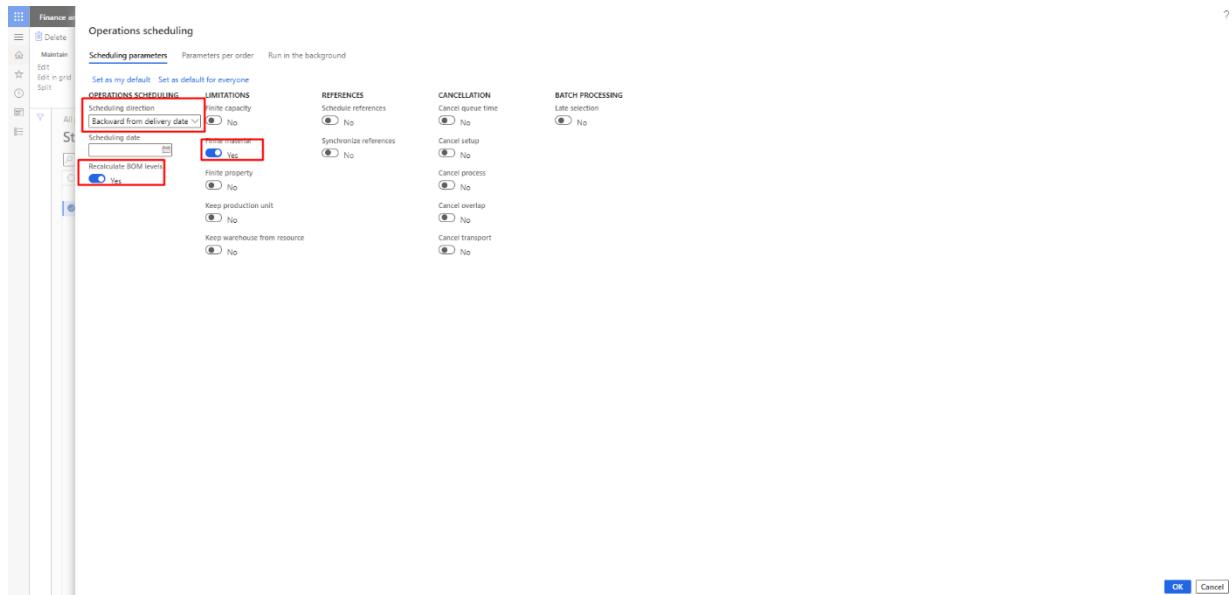


Figure 10 Operation Scheduling to Calculate Production Scheduling

The user will receive the popup to calculate the inventory shortage report of the production order.

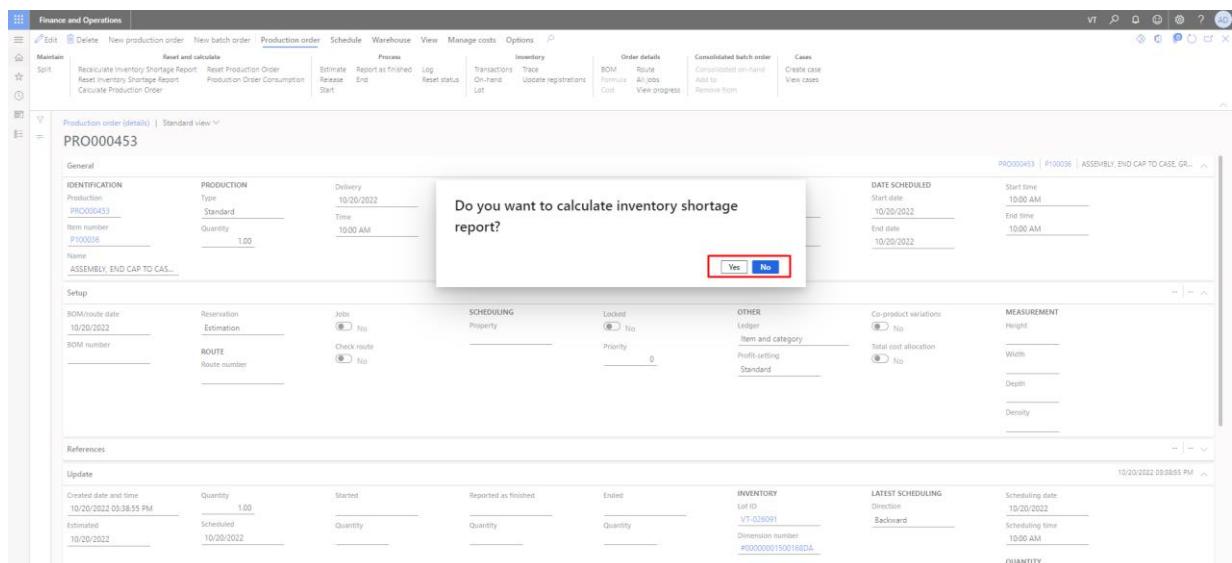


Figure 11 Pop up Calculate Inventory Shortage Report

The screenshot shows the 'Production order (details)' screen in Dynamics 365. The top navigation bar includes 'Edit', 'Delete', 'New production order', 'New batch order', 'Production order', 'Schedule', 'Warehouse', 'View', 'Manage costs', and 'Options'. The main area displays a production order for item 'PRO000453' with quantity 1.00. The 'SCHEDULING' section shows delivery date 10/20/2022 at 10:00 AM, color 12B, and status 'Report as finished'. The 'INVENTORY' section shows lot ID VT-026091 and dimension number #00000015001680A. On the right, a 'Run in the background' panel is open, showing a task description 'PRO000453 | ASSEMBLY, END CAP TO CASE, GROUNDING STRAP 6.00" Recalculation' with a 'Batch processing' checkbox set to 'Yes'. A red box highlights the 'OK' button at the bottom right of the panel.

Figure 12 Fill Data and Press OK to Recalculate

The user will receive the access the success message (Job is added in the batch Queue) after performing all the calculations to calculate the production order. It is the automate process to calculate the all the calculation of the production order.

The screenshot shows the same 'Production order (details)' screen as Figure 12. A red box highlights a success message at the top: 'The PRO000453 | ASSEMBLY, END CAP TO CASE, GROUNDING STRAP 6.00" Recalculation job is added to the batch queue.' The rest of the screen is identical to Figure 12, showing the production order details and the background recalculation process.

Figure 13 Success Message of Calculate Batch Job

The user will receive the access the Failure message (Please wait for the process to end), If the any of the job is already in the queue.

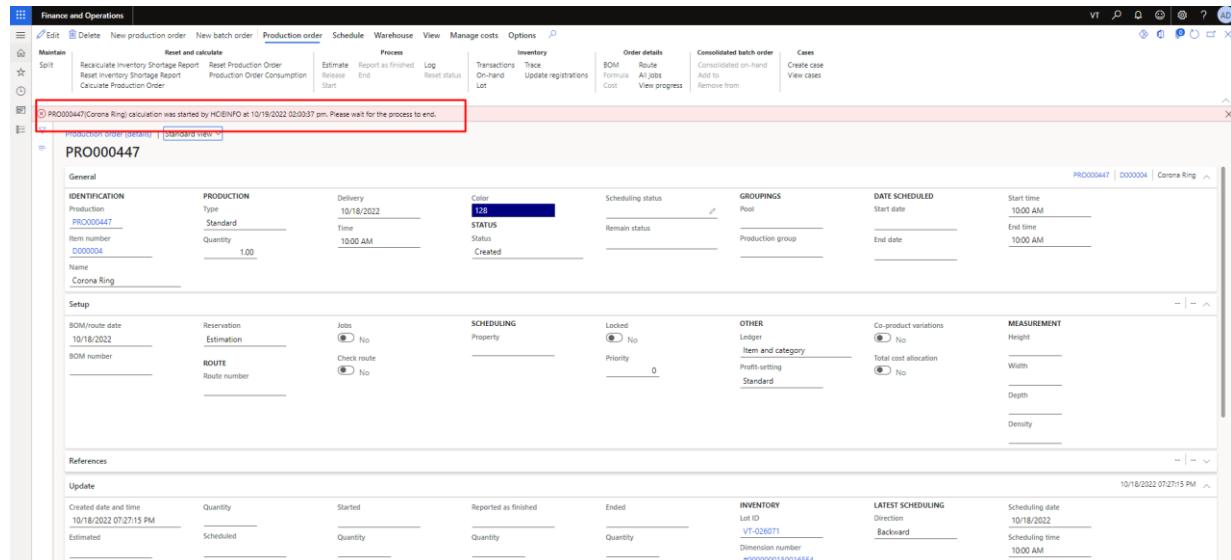


Figure 14 Wait Message If the already job in Queue

2.5 Production Ordering Batch Job Monitoring

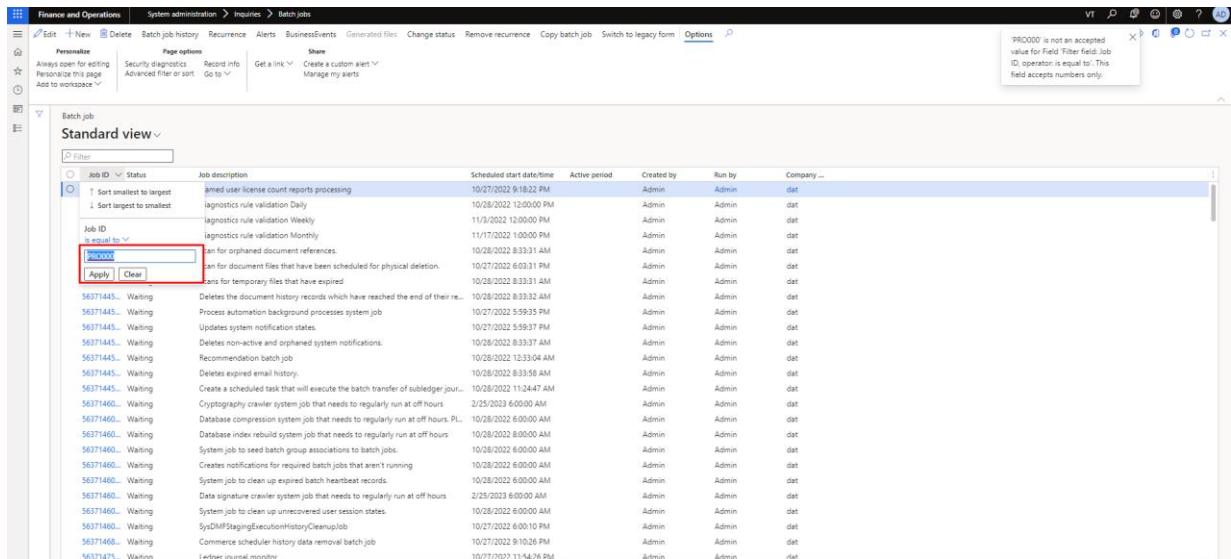
The user can get Batch job by clicking on module then production to click on all system administrations. The process can understand by seeing the below **Figure 16**. As the user click on the batch job then will be able to review the list of batch jobs with their status which is shown in the **Figure 17**. The user only can perform the reset or calculation only if the status of job is ended. The user can filter their specific batch job by searching its PO number and compare its ID. Batch job have different status like Waiting, Error and Ended.

Finance and Operations		Batch jobs				
		Batch jobs				
Cost accounting		Scheduled start date/time	Active period	Created by	Run by	Company accou...
Cost management		10/19/2022 9:18:22 PM		Admin	Admin	dat
Credit and collections		in Daily	10/19/2022 12:00:00 PM	Admin	Admin	dat
Demo data		in Weekly	10/20/2022 12:00:00 PM	Admin	Admin	dat
Expense management		in Monthly	11/17/2022 1:00:00 PM	Admin	Admin	dat
Fixed assets		rent references.	10/19/2022 8:33:31 AM	Admin	Admin	dat
Fleet management		that have been scheduled for physical deletion.	10/18/2022 8:48:31 PM	Admin	Admin	dat
General ledger		that have expired	10/19/2022 8:33:31 AM	Admin	Admin	dat
Human resources		story records which have reached the end of their re...	10/19/2022 8:33:32 AM	Admin	Admin	dat
Inventory management		ground processes system job	10/18/2022 8:48:35 PM	Admin	Admin	dat
Landed cost		ion states.	10/18/2022 8:48:37 PM	Admin	Admin	dat
Master planning		phanated system notifications.	10/19/2022 8:33:37 AM	Admin	Admin	dat
Organization administration		ob	10/21/2022 12:33:04 AM	Admin	Admin	dat
Payroll		tory.	10/19/2022 8:33:58 AM	Admin	Admin	dat
Procurement and sourcing		hat will execute the batch transfer of subledger jour...	10/19/2022 11:24:47 AM	Admin	Admin	dat
Product information management		tem job that needs to regularly run at off hours.	2/25/2023 6:00:00 AM	Admin	Admin	dat
Production control		tem job that needs to regularly run at off hours. Pl...	10/19/2022 6:00:00 AM	Admin	Admin	dat
Project management and accounting		ystem job that needs to regularly run at off hours.	10/19/2022 8:00:00 AM	Admin	Admin	dat
Questionnaire		i group associations to batch jobs.	10/19/2022 6:00:00 AM	Admin	Admin	dat
Retail and Commerce		required batch jobs that aren't running	10/19/2022 6:00:00 AM	Admin	Admin	dat
Sales and marketing		spired batch heartbeat records.	10/19/2022 6:00:00 AM	Admin	Admin	dat
Service management		stem job that needs to regularly run at off hours.	2/25/2023 6:00:00 AM	Admin	Admin	dat
I System administration		recovered user session states.	10/19/2022 6:00:00 AM	Admin	Admin	dat
Tax		HistoryCleanupJob	10/18/2022 9:00:10 PM	Admin	Admin	dat
Time and attendance		tory data removal batch job	10/18/2022 9:02:26 PM	Admin	Admin	dat
Transportation management		10/18/2022 11:54:26 PM	Admin	Admin	dat	
Vendor collaboration		10/18/2022 8:48:45 PM	HCIEINFO	HCIEINFO	dat	
Warehouse management		ed tables	10/19/2022 7:03:46 PM	HCIEINFO	HCIEINFO	dat

Figure 15 Production Ordering Batch Job Monitoring

2.5.1 Batch Job List

The user needs to clicks on the batch job to review the list of batch jobs with their status which is shown in the **Figure 16**. Batch job have different status like Waiting, Error and Ended. The user only can perform the reset or calculation only if the status of job is ended. The user can filter their specific batch job by searching its PO number and compare its ID. Batch job have different status like Waiting, Error and Ended.

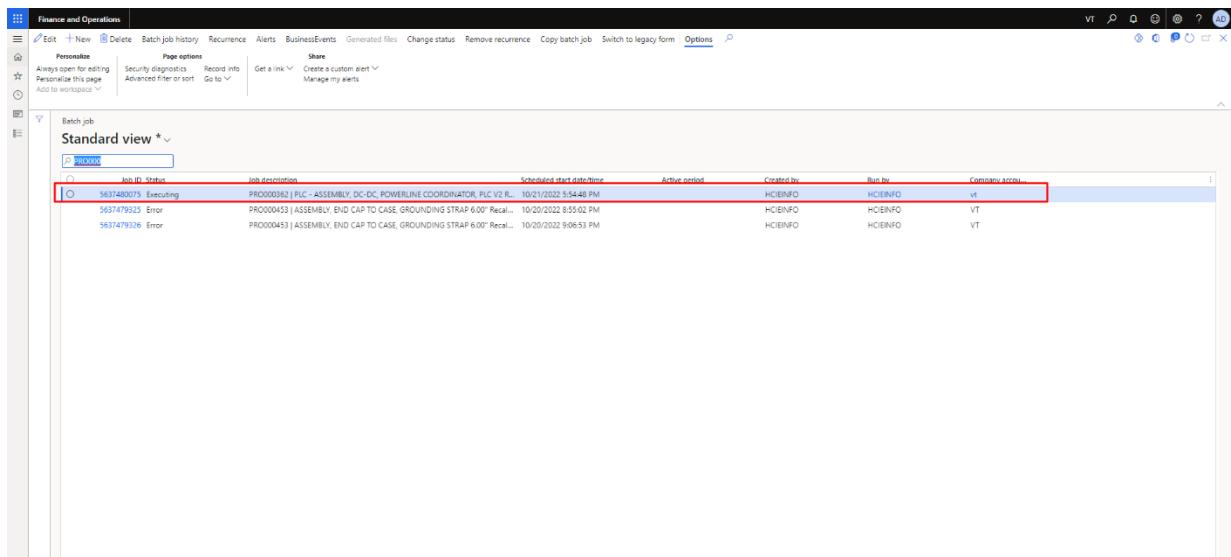


Job ID	Status	Job description	Scheduled start date/time	Active period	Created by	Run by	Company ...
56371445...	Waiting	armed user license count reports processing	10/27/2022 9:18:20 PM		Admin	Admin	dat
56371445...	Waiting	logistics rule validation Daily	10/28/2022 12:00:00 PM		Admin	Admin	dat
56371445...	Waiting	logistics rule validation Weekly	11/3/2022 12:00:00 PM		Admin	Admin	dat
56371445...	Waiting	logistics rule validation Monthly	11/17/2022 1:00:00 PM		Admin	Admin	dat
56371445...	Waiting	can for orphaned document references.	10/28/2022 8:33:31 PM		Admin	Admin	dat
56371445...	Waiting	can for temporary files that have been scheduled for physical deletion.	10/27/2022 6:03:11 PM		Admin	Admin	dat
56371445...	Waiting	Deletes the document history records which have reached the end of their re...	10/28/2022 8:33:32 AM		Admin	Admin	dat
56371445...	Waiting	Process automation background processes system job	10/27/2022 5:59:35 PM		Admin	Admin	dat
56371445...	Waiting	Updates system notification states	10/27/2022 5:59:37 PM		Admin	Admin	dat
56371445...	Waiting	Deletes non-active and orphaned system notifications.	10/28/2022 8:33:37 AM		Admin	Admin	dat
56371445...	Waiting	Recommendation batch job	10/28/2022 12:33:04 AM		Admin	Admin	dat
56371445...	Waiting	Deletes expired email history.	10/28/2022 8:33:56 AM		Admin	Admin	dat
56371445...	Waiting	Create a scheduled task that will execute the batch transfer of subledger jour...	10/28/2022 11:34:47 AM		Admin	Admin	dat
56371460...	Waiting	Cryptography crawler system job that needs to regularly run at off hours.	2/25/2023 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	Database compression system job that needs to regularly run at off hours. PL...	10/28/2022 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	Database index rebuild system job that needs to regularly run at off hours	10/28/2022 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	System job to seed batch group associations to batch jobs.	10/28/2022 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	Creates notifications for required batch jobs that aren't running	10/28/2022 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	System job to clean up expired batch heartbeat records.	10/28/2022 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	Data signature crawler system job that needs to regularly run at off hours	2/25/2023 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	System job to clean up uncorrected user session states.	10/28/2022 6:00:00 AM		Admin	Admin	dat
56371460...	Waiting	SysDMF StagingExecutionHistoryCleanupJob	10/27/2022 6:00:10 PM		Admin	Admin	dat
56371460...	Waiting	Commerce scheduler history data removal batch job	10/27/2022 9:10:20 PM		Admin	Admin	dat
56371475...	Waiting	Ledger journal monitor.	10/27/2022 11:54:26 PM		Admin	Admin	dat

Figure 16 Monitoring Batch Job

2.5.2 Selected Batch Job

The user can filter to find their specific job to check its status.



Job ID	Status	Job description	Scheduled start date/time	Active period	Created by	Run by	Company ...
5637400075	Executing	PRO000052 PLC - ASSEMBLY_DC-DC_POWERLINE COORDINATOR_PLC V2_R...	10/21/2022 5:54:46 PM		HCIINFO	HCIINFO	v1
5637479325	Error	PRO000453 ASSEMBLY-END CAP TO CASE_GROUNDING STRAP 6.00" Recal...	10/20/2022 5:55:02 PM		HCIINFO	HCIINFO	VT
5637479326	Error	PRO000453 ASSEMBLY-END CAP TO CASE_GROUNDING STRAP 6.00" Recal...	10/20/2022 9:06:53 PM		HCIINFO	HCIINFO	VT

Figure 17 Selected Batch Job

2.6 Reset Production Order

If you want to Reset Production order of the batch job, click on the “Reset Inventory Shortage Report” tab (from purchase order). The user will be able to see the detail pop to calculate the shortage batch job. The need to fill the data as per requirement to calculate job then click on “OK” to submit the calculation. As the user press the “Yes” then user will be able to see the detail pop to fill the data as per requirement to calculate job then click on “OK” to submit the calculation which is also highlighted in the **Figure 19 and 20**. If desired status is as per order then user will receive the message to reset cannot be forwarded otherwise user will receive the success message. which is also highlighted in the **Figure 21 and 22**.

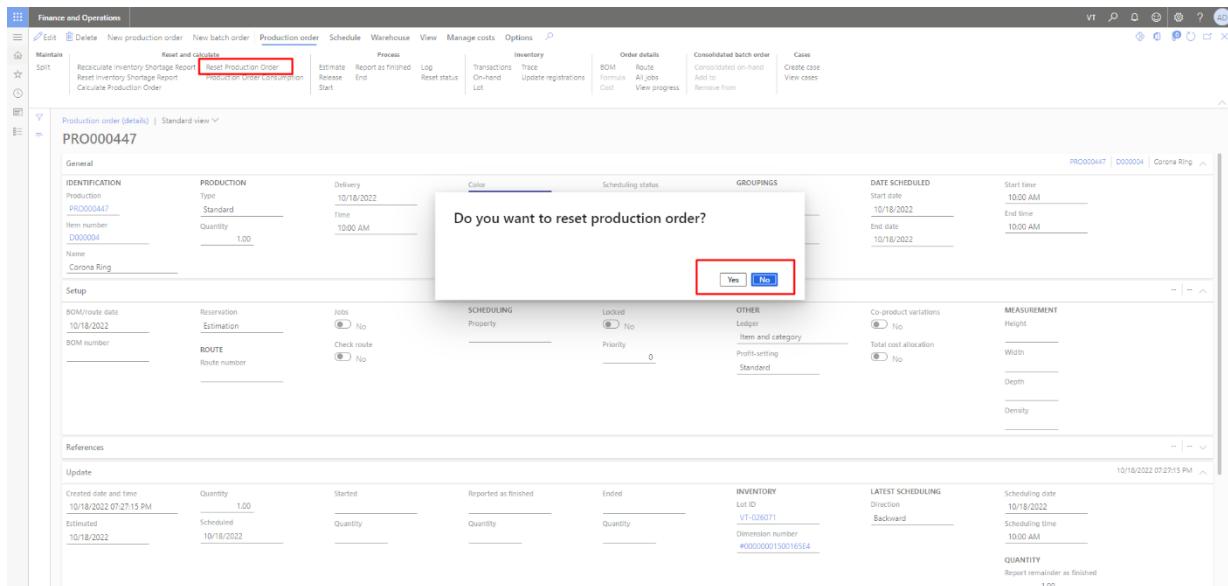


Figure 18 Reset Production Order

The user can reset the status of the production order by selecting its desired status. The user can only reset in descending order Scheduling, Estimate etc.

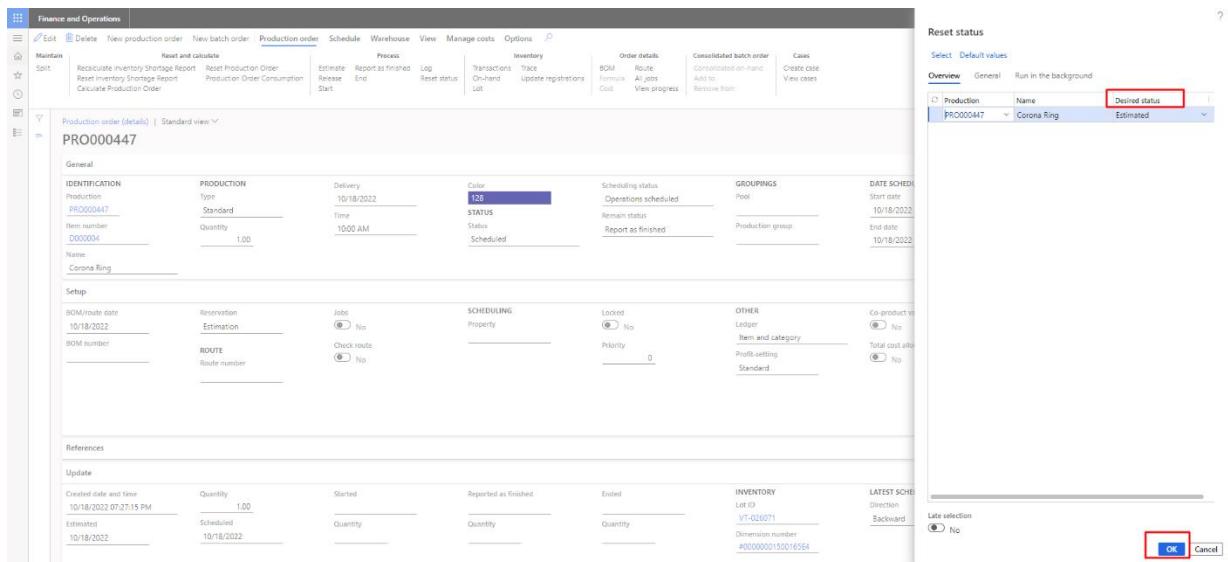


Figure 19 Selection of Reset Status

The user can reset the status of the production order by selecting its desired status. The user can see in the above Figure that production order has the Estimated status of the production order. Now, In the below Figure can see that status of the production order is converted from Estimated to Created.

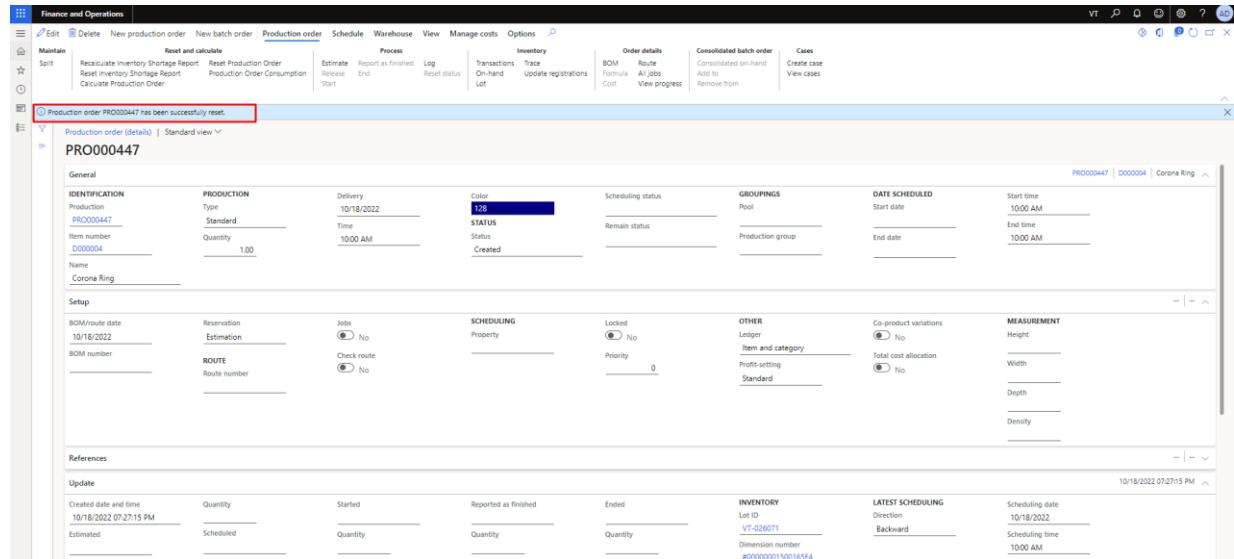


Figure 20 Success Message of Reset Production Order

The user can reset the production order with an order, In the below Figure user can see that production order has the first status of the production order. User can't forward to another status to it.

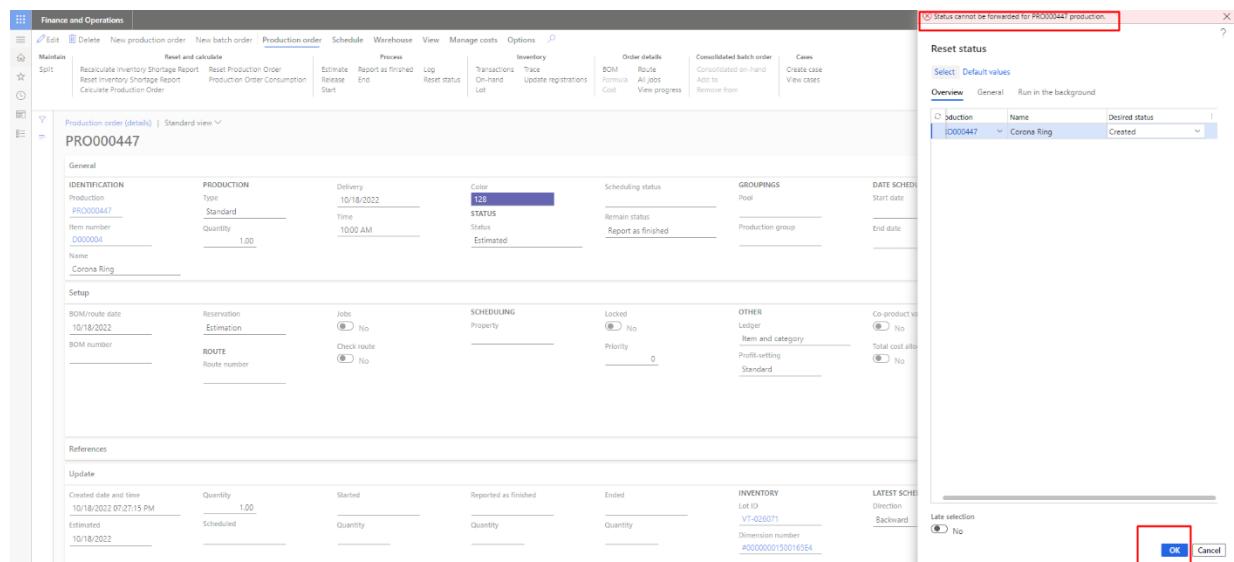


Figure 21 Error While Reset the Status of the Production Order

3 Consolidate Report

The user needs to open the all production orders to access the Consolidate Report. The user needs to click on consolidate report from View Tab. Consolidate report show us what is require to make any item and what we have in our stack to make. The user can see the consolidate report of the production order in the **Figure 23**. As the you can see in the **Figure 23** production order has the part numbers. User can see the On-Hand Items, Need to Orders, Delays Days, Available Inventory and Type. every part number have unique these properties. The user can also view each part number by filtering these properties like user can see the Make or Buy or Assembly by implementing the filter.

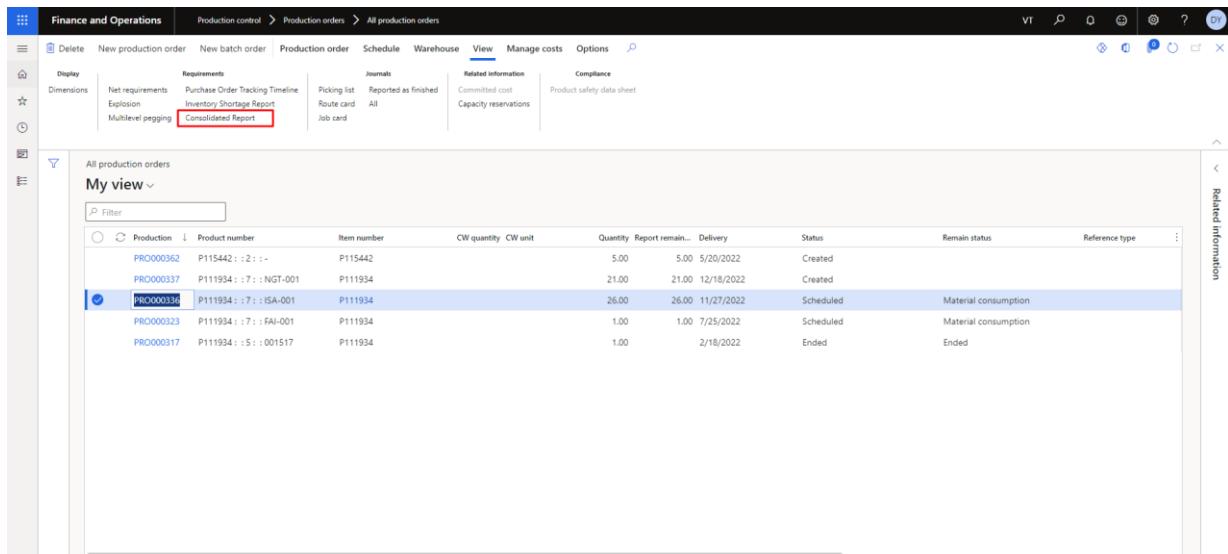


Figure 22 Consolidate Report

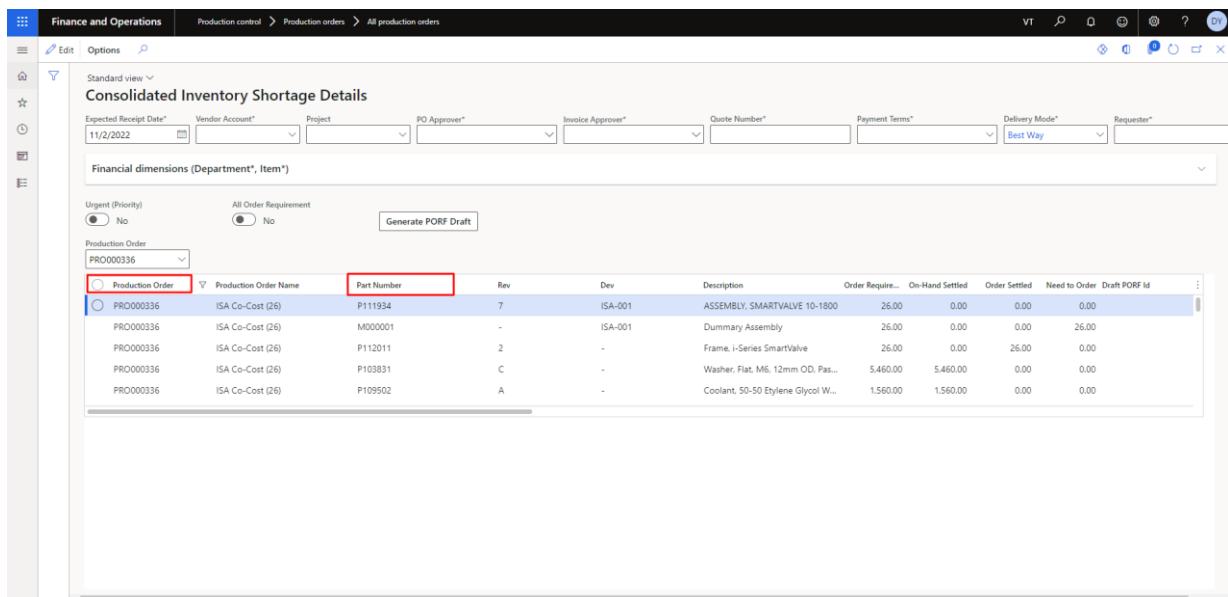


Figure 23 Consolidate Report of Specific Production Order

4 Inventory Shortage Report

The user needs to open the all production orders to access the Inventory Shortage Report. The user needs to click on Inventory Shortage report from View Tab. The user can see the Inventory Shortage Report of the production order in the **Figure 26**. Production Order has the parent number and part number. It's a one to many relations between parent and part number. A parent number can have the multiple part numbers. As the you can see in the **Figure 26** production order has the part numbers. User can see the On-Hand Items, Need to Orders, Delays Days, Available Inventory and Type. every part number have unique these properties. The user can also view each part number by filtering these properties like user can see the Make or Buy or Assembly by implementing the filter.

The screenshot shows the Dynamics 365 Finance and Operations interface. The ribbon at the top has 'Production control > Production orders > All production orders'. The 'View' tab is selected. In the 'Display' section of the ribbon, 'Inventory Shortage Report' is highlighted with a red box. The main area shows a grid of production orders with columns for Production, Product number, Item number, CW quantity, CW unit, Quantity, Report remain..., Delivery, Status, Remain status, Reference type, and a 'Related information' column.

Figure 24 Inventory Shortage Report

The screenshot shows the 'Production order (details)' view for order PRO000336. The 'View' tab is selected in the ribbon. The 'General' section displays various details such as Identification, Production, Delivery, Status, Groupings, and Setup. The 'Setup' section includes fields like BOM/route date, Route, Scheduling, Other, and Measurement. A status bar at the bottom right shows PRO000336 | P111934 | ISA Co-Cost (26).

Figure 25 Open Inventory Shortage Report of the production Order

The screenshot shows the 'Inventory Shortage Details' view for order PRO000336. The 'View' tab is selected in the ribbon. The table lists various components with columns for Production Order Name, Parent Number, Part Number, Rev, Dev, Description, Order Require..., On-Hand Settled, Order Settled, and Need to Order. A 'Total' row at the bottom shows the sum of all items.

Figure 26 Inventory Shortage Report of the Specific production Order

5 Explosion View

This feature gives information regarding bill of materials (BOM). It enhances the view of inventory, available and non-available items. A demand explosion of BOM version generates the demand for each of the BOM line items at specified site and warehouse.

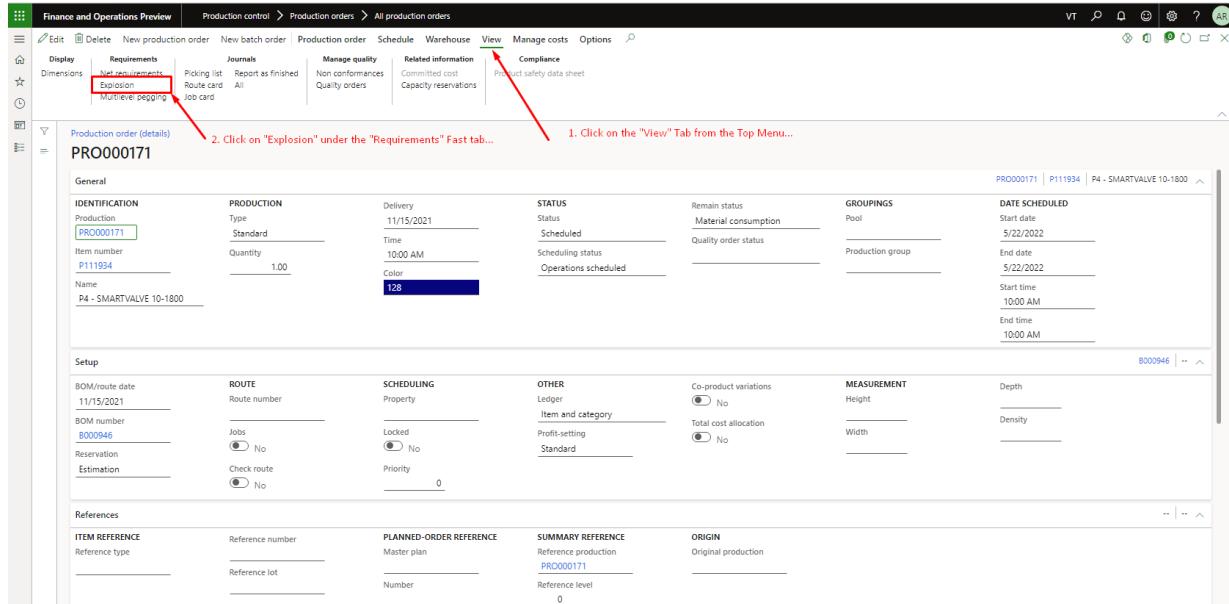


Figure 27 Select the 'View' tab and click on the 'Explosion' Option

5.1 Overview

To get the summary or information about any particular production order, click on the overview option. It will show the list of BOMs, assemblies and sub-assemblies.

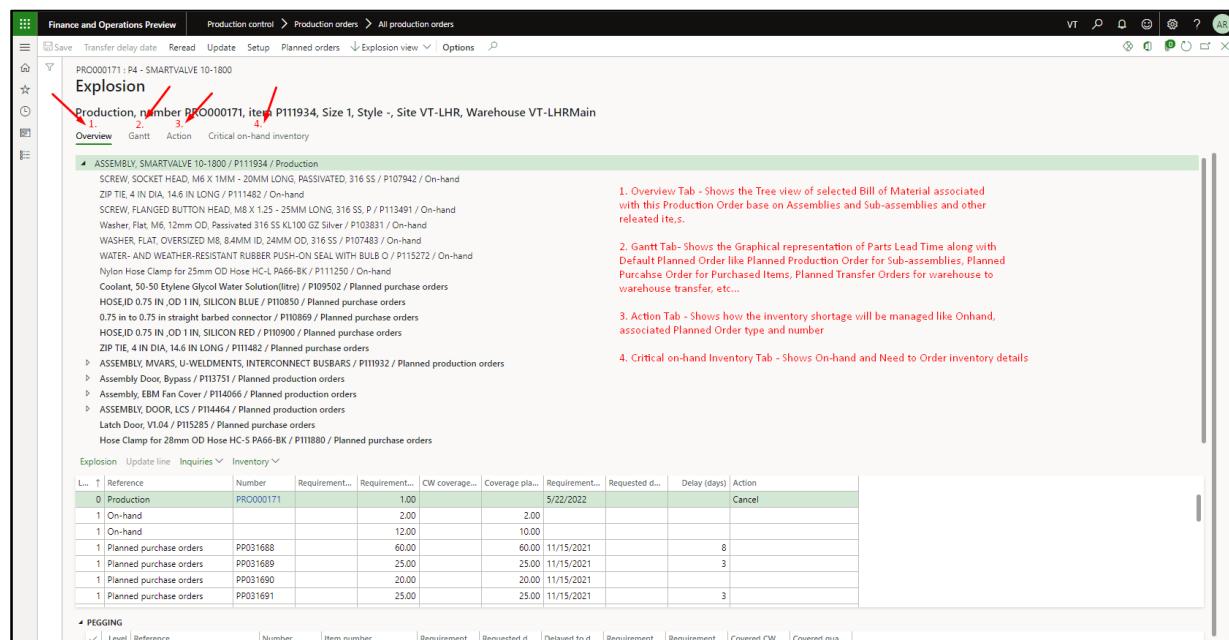


Figure 28 To view BOM's associated with production order, select the 'Overview' Option

5.2 Gantt Chart

It shows the graphical representation of parts lead time. Also, it shows the information about planned production orders for sub-assemblies & purchased items.

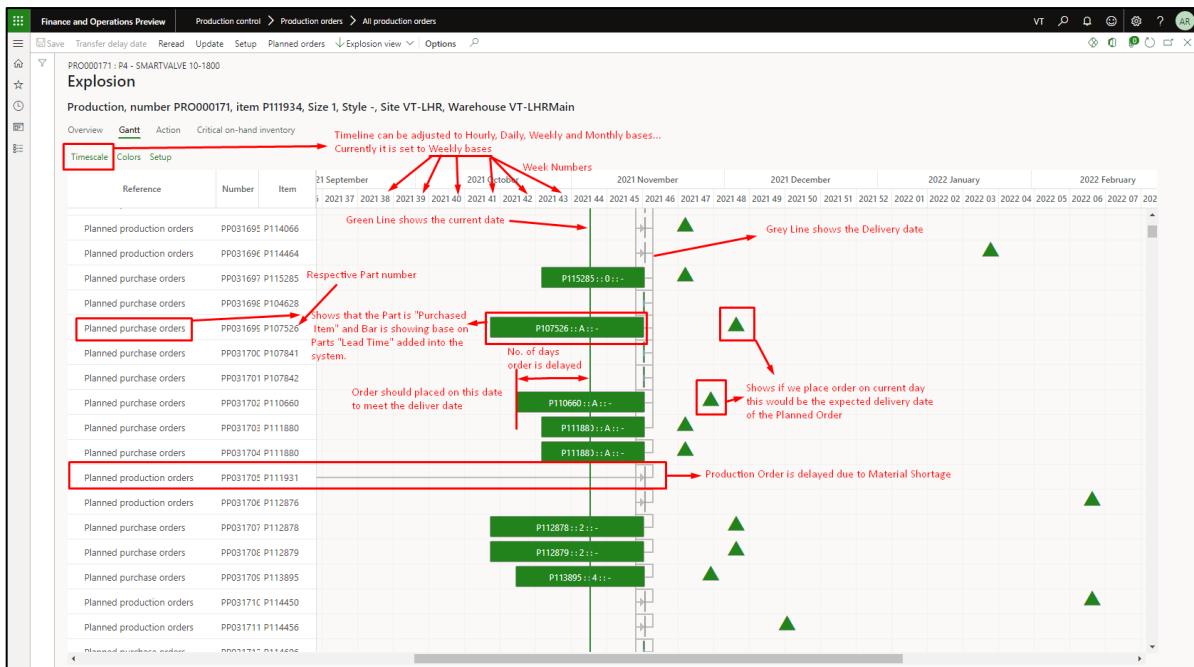


Figure 29 Shows the graphical representation of parts lead time

5.3 Critical on-hand Inventory

It shows the details of inventory items which are on-hand & unavailable items. You can use as a check for items that might have got below the minimum.

The figure shows a table of critical on-hand inventory. Red arrows point to specific rows: Row 1 (P105790) for 'Un allocated On-hand Inventory - On-hand inventory which is not reserved for any other Production Order'. Row 2 (P111910) for 'Order Settled - will settle from Purchase Order, Production Order or Transfer Order'. Row 3 (P111932) for 'Need To Order - Quantity need to Purchase base on On-Hand shortage'. Row 4 (P111934) for 'Delayed - Number of days delayed based Part's "Lead Time" and "Delivery Date" of the Production Order'.

Item number	Product name	Revisions	Site	Warehouse	Order Required	Un allocated On-hand Inv.	Order settled	Need To Order	Delayed	Physical inventory	
P105790	SCR Module 8xV 4120A, Single Chassis Mount, DO-20...	A	VT-LHR	VT-LHMain	-12.00	-6.00	1.	-6.00	188	6.00	
P111910	ASSEMBLY, SCR CLAMP, DOUBLE STACK / ASSEMBLY, ...	2	VT-LHR	VT-LHMain	-3.00	1.	2.	3.	-3.00	4.	188
P111932	ASSEMBLY, MVAR, U-WELDMENTS, INTERCONNECT ...	2	VT-LHR	VT-LHMain	-1.00				-1.00		188
P111934	ASSEMBLY, PCBAST TRAYS & BYPASS HARNESS / ...	1	VT-LHR	VT-LHMain	-1.00				-1.00		188
P111930	ASSEMBLY, BF, NEMA RADS AND VERTICAL FRPS / Assem...	1	VT-LHR	VT-LHMain	-1.00				-1.00		188
P111929	ASSEMBLY, DMC, HIGH-CURRENT BUSBAR 10-1800..._1	1	VT-LHR	VT-LHMain	-1.00				-1.00		188
P112577	ASSEMBLY, A-PAIR, DOUBLE STACK SCRS / ASSEMBLY, _1	1	VT-LHR	VT-LHMain	-1.00				-1.00		188
P112591	SCREW, FLANGED BUTTON HEAD, M5 X 0.8 - 10MM, ...	A	VT-LHR	VT-LHMain	-702.00	-573.00	-1.00	-128.00	115	573.00	
P111386	SCREW, HEX HEAD, M5 X 0.8MM - 20MM LONG, NYL, _1	A	VT-LHR	VT-LHMain	-32.00	-28.00	-4.00		114	28.00	
P107420	SCREW, SOCKET SCREW M8 X 125 - 20MM LONG, SS, ..._B	B	VT-LHR	VT-LHMain	-7.00			-1.00	-6.00	104	
P114450	ASSEMBLY, 1 MVAR, SMARTVALVE, 12X CAPACITORS / ..._0	0	VT-LHR	VT-LHMain	-10.00				-10.00	88	
P112831	Assembly, CAPACITOR BANK, VSL, GEN-II / Assembly, ..._0	0	VT-LHR	VT-LHMain	-2.00			-2.00		88	
P112922	Assembly, Capacitor Bank, PHT-DC PSB & VSL Driver ..._0	0	VT-LHR	VT-LHMain	-1.00			-1.00		88	
P114449	Assembly, MVar/Electrical Interface 12X Capacitors Ba...	0	VT-LHR	VT-LHMain	-10.00			-10.00		88	
P112876	ASSEMBLY, TRAY, MINI-VSL / ASSEMBLY, TRAY, CLB	0	VT-LHR	VT-LHMain	-10.00			-10.00		88	
P115216	ASSEMBLY, CAPACITOR BANK, 3X CAP, PHT-DC PSB & ..._0	0	VT-LHR	VT-LHMain	-1.00			-1.00		88	
P114446	Assembly, 12X Cap Bank, KEMET Capacitor / Assembly, ..._0	0	VT-LHR	VT-LHMain	-20.00			-20.00		88	
P113839	CAPACITOR, SW MP3-91351, BYPASS FILTER / CAPACIT..._A	A	VT-LHR	VT-LHMain	-1.00			-1.00		88	
P106942	KEMET Capacitor / KEMET Capacitor	A	VT-LHR	VT-LHMain	-275.00			-275.00		88	
P121888	ASSEMBLY, REACTOR PLATE, BYPASS FILTER / ASSEM..._1	1	VT-LHR	VT-LHMain	-1.00			-1.00		88	
P113557	VACUUM INTERRUPTER / VACUUM INTERRUPTER	A	VT-LHR	VT-LHMain	-2.00			-2.00		68	
P107213	VSL 170 DRIVE CIRCUIT SUBASM / ASSEMBLY, VI DRIV..._0	0	VT-LHR	VT-LHMain	-2.00			-2.00		68	
P113700	VSL 170 ASSEMBLY / VSL, 170 ASSEMBLY	0	VT-LHR	VT-LHMain	-2.00			-2.00		68	
P115063	Assembly, LCS Isolation Panel / Assembly, LCS Isolat...	0	VT-LHR	VT-LHMain	-10.00			-10.00		68	
P114464	ASSEMBLY, DOOR, LCS / ASSEMBLY, DOOR, LCS	1	VT-LHR	VT-LHMain	-5.00			-5.00		68	
P111399	Assembly, Panel Mount Fitting, LCS, weldment / Assem...	1	VT-LHR	VT-LHMain	-20.00	-8.00		-12.00	68	8.00	
P106499	Belleville Washer, 50 x 254 x 3.0 x 4.10, DIN 2093A50 / ..._A	A	VT-LHR	VT-LHMain	-240.00	-36.00		-204.00	63	36.00	
P114204	Assembly, iDCE & Shorting Terminals / Assembly, iD...	1	VT-LHR	VT-LHMain	-1.00			-1.00		58	
P114307	ASSEMBLY, PHT-DC PSB / PCBA, PHT-DC PSB	1	VT-LHR	VT-LHMain	-12.00			-12.00		58	
P112180	PCBA, PHT-DC PSB / PCBA, PHT-DC PSB	1	VT-LHR	VT-LHMain	-15.00	-6.00		-9.00	58	6.00	

Figure 30 Show on-hand and need to order inventory details

5.4 Action

It will show the information of those items which are on hand or in the process of planned production order. This action tab will help you to filter out inventory shortage items.

Item number	Reference	Number	Action	Days	To date	Changed by ...	Changed qua...
P111934	Production	PR0000171	Cancel			-1,00	
P111934	On-hand	Part will be settle from On-hand qty available in the warehouse					
P111934	On-hand						
P109502	Planned purchase orders	PP031698					
P110850	Planned purchase orders	PP031699					
P110869	Planned purchase orders	PP031690					
P110900	Planned purchase orders	PP031691					
P111482	Planned purchase orders	PP031692					
P111932	Planned production orders	PP031693					
P113751	Planned production orders	PP031694					
P114066	Planned production orders	PP031695					
P114464	Planned production orders	PP031696					
P115285	Planned purchase orders	PP031697					
P107942	On-hand						
P111561	On-hand						
P107841	On-hand						
P107842	On-hand						
P112227	On-hand						
P112892	On-hand						
P112893	On-hand						
P112907	On-hand						
P112908	On-hand						
P114724	On-hand						
P112547	On-hand						
P113439	On-hand						
P113749	On-hand						
P114348	On-hand						
P115074	On-hand						
P114700	On-hand						
P115170	On-hand						
P104638	Planned purchase orders	PP031698					

Figure 31 Shows how inventory shortage will be managed

5.4.1 Filter and Open Sub-Assembly

If you want to know the status of any particular item, click on the filter icon located on the item number column.

Item num...	Reference	Number	Action	Days	To date	Changed by ...	Changed qua...
P114450	Planned production orders	PP031710					

Figure 32 To find specific item number

6 Remove Existing Planned Orders

6.1 Explosion View

Explosion view shows the details of production order breakdown like assemblies, sub-assemblies, inventory shortage, on-hand items, Planned production order etc.

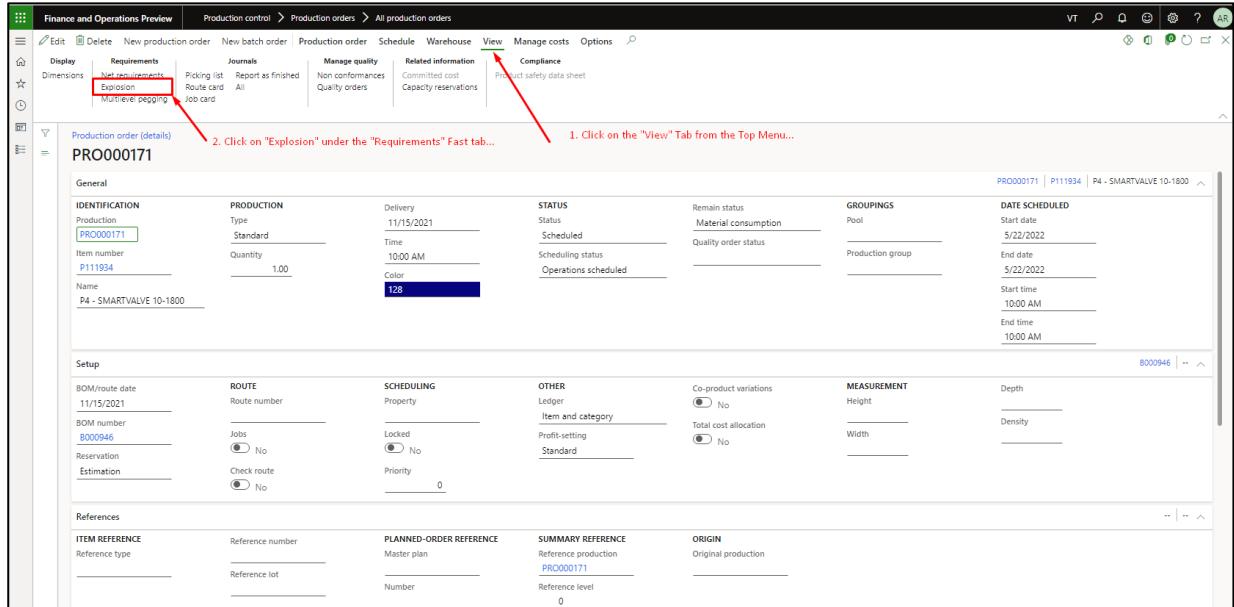


Figure 33 Select the 'View' tab and click on 'Exploration'

6.2 Open Planned Orders

Open Planned orders are the type of orders which are not in the confirm stage. To check the planned orders, click on the ‘Planned Order’ option available on the top.

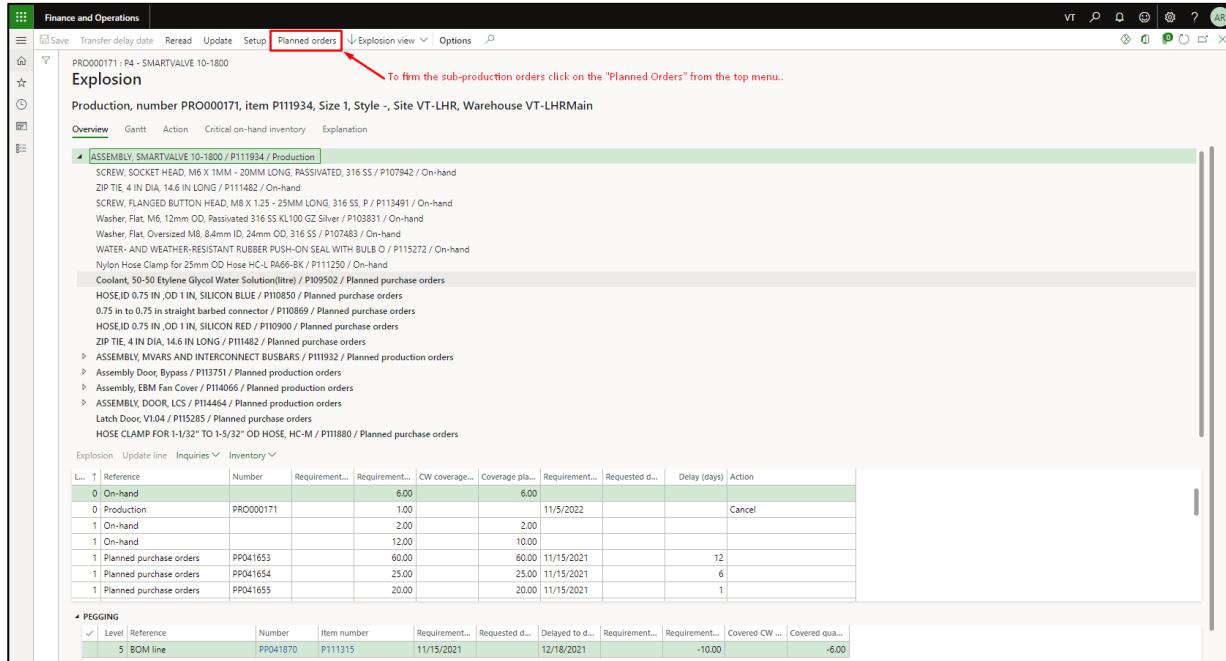


Figure 34 Select the 'Planned Orders' available on top

6.3 Select and Remove Planned Orders

To recalculate production, select all available planned orders and delete them.

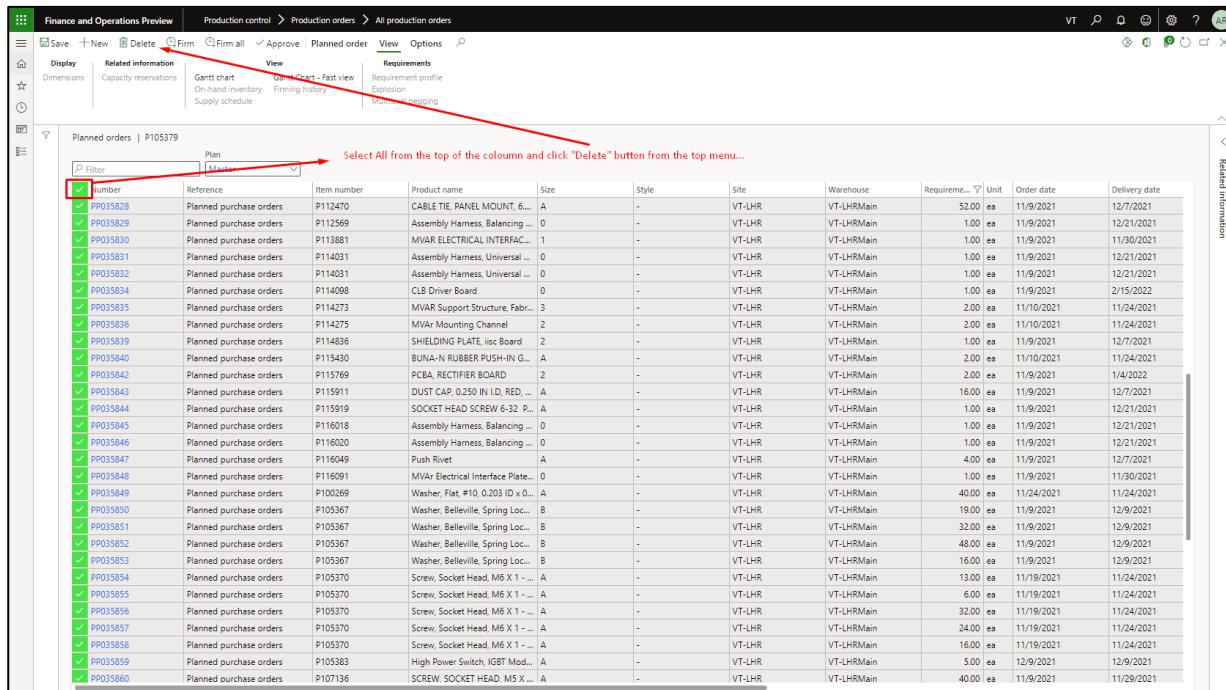


Figure 35 Check mark those planned orders you want to delete

7 Production Order Calculations (Optional)

7.1 Recalculate Inventory Shortage Report

If you want to Recalculate the Inventory Shortage Report of the production order, click on the “Recalculate the Inventory Shortage Report” tab (from purchase order). The user will be able to see the detail pop to calculate the shortage batch job. The need to fill the data as per requirement to calculate job then click on “OK” to submit the calculation. As the user press the “Yes” then user will be able to see the detail pop to fill the data as per requirement to calculate job then click on “OK” to submit the calculation which is also highlighted in the **Figure 36 and 37**. If another job is in the Queue then user will receive the message to wait until its completed other user will receive the success message. which is also highlighted in the **Figure 38 and 39**. If the user receives the success message then can check its operation in batch job to check it's status. Batch job have different status like waiting, error and ending.

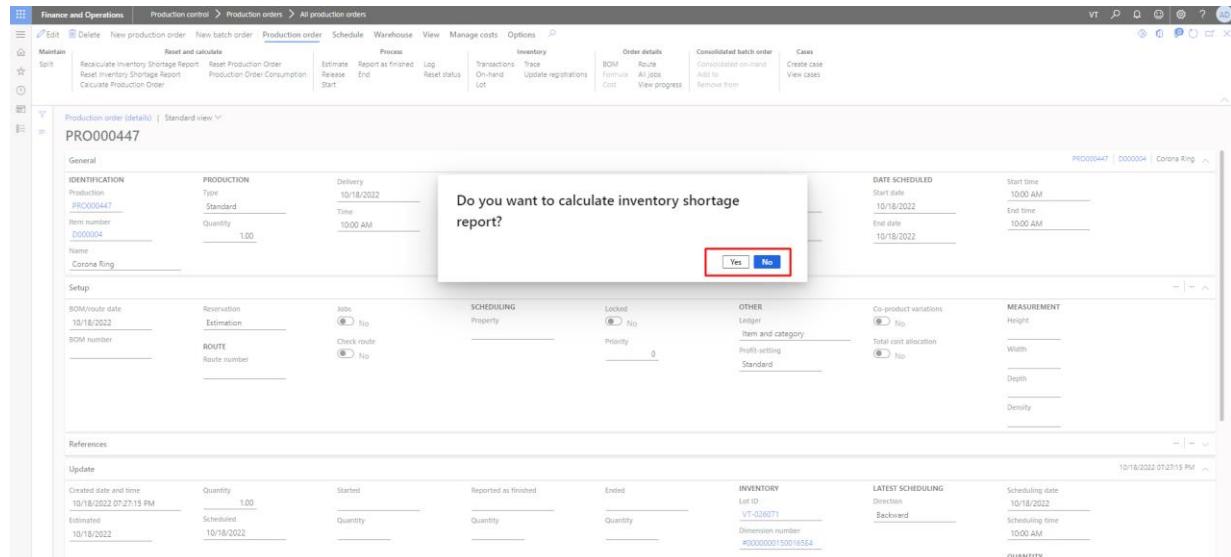


Figure 36 Recalculate Inventory Shortage Report

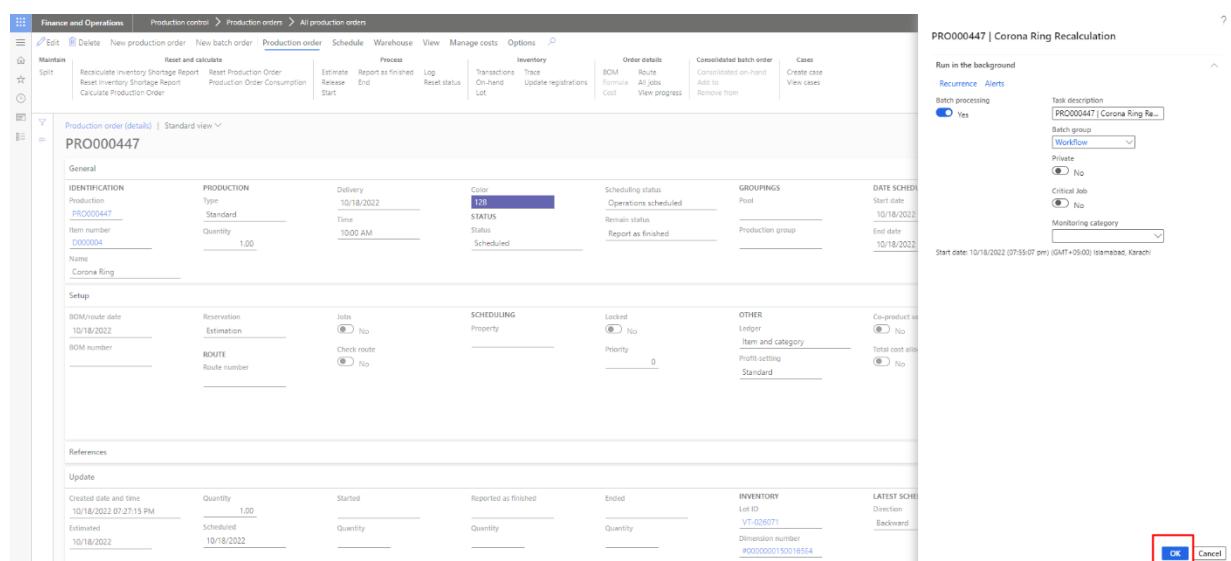


Figure 37 Fill Data and Press OK to Recalculate

The user will receive the access the success message (Job is added in the batch Queue) after performing the recalculations to Inventory Shortage of the production order. It is the automate process to Recalculate the Inventory Shortage Report of the production order.

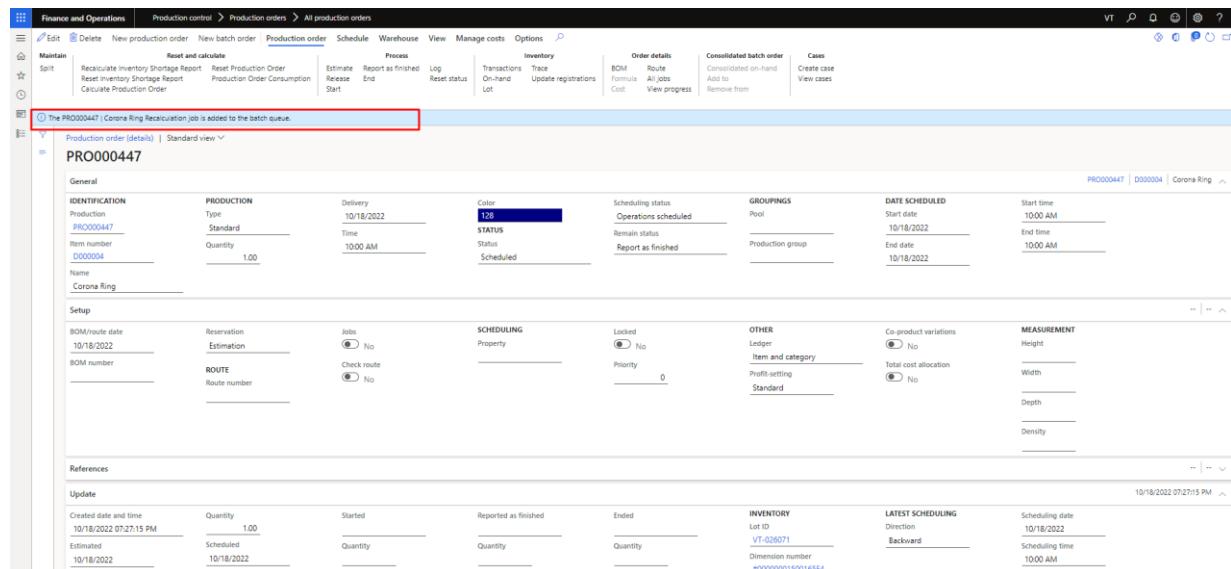


Figure 38 Success Message of Recalculating Inventory Shortage Report

The user will receive the access the Failure message (Please wait for the process to end), If the any of the job is already in the queue.

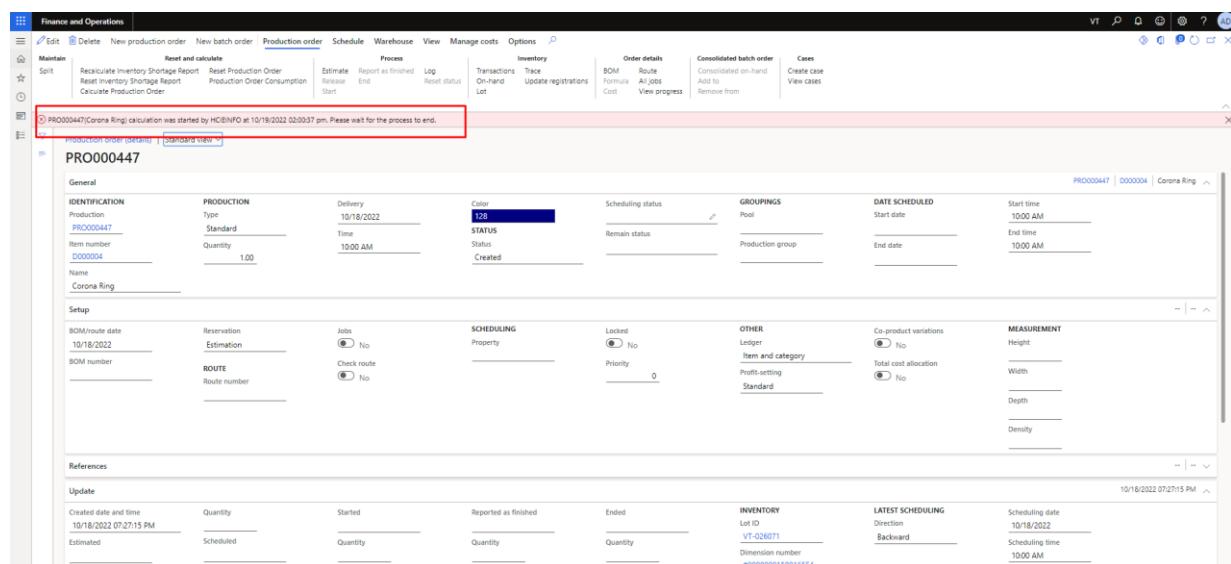


Figure 39 Wait Message If the already job in Queue

7.2 Reset Inventory Shortage Report

If you want to Reset the Inventory Shortage Report of the batch job, click on the “Reset Inventory Shortage Report” tab (from purchase order). The user will be able to see the detail pop to calculate the shortage batch job. The need to fill the data as per requirement to calculate job then click on “OK” to submit the calculation. As the user press the “Yes” then user will be able to see the detail pop to fill the data as per requirement to calculate job then click on “OK” to submit the calculation which is also highlighted in the **Figure 40**. If another job is in the Queue then user will receive the message to wait until its completed other user will receive the success message. which is also highlighted in the **Figure 41 and 42**. If the user receives the success message then can check its operation in batch job to check its status. Batch job have different status like waiting, error and ending.

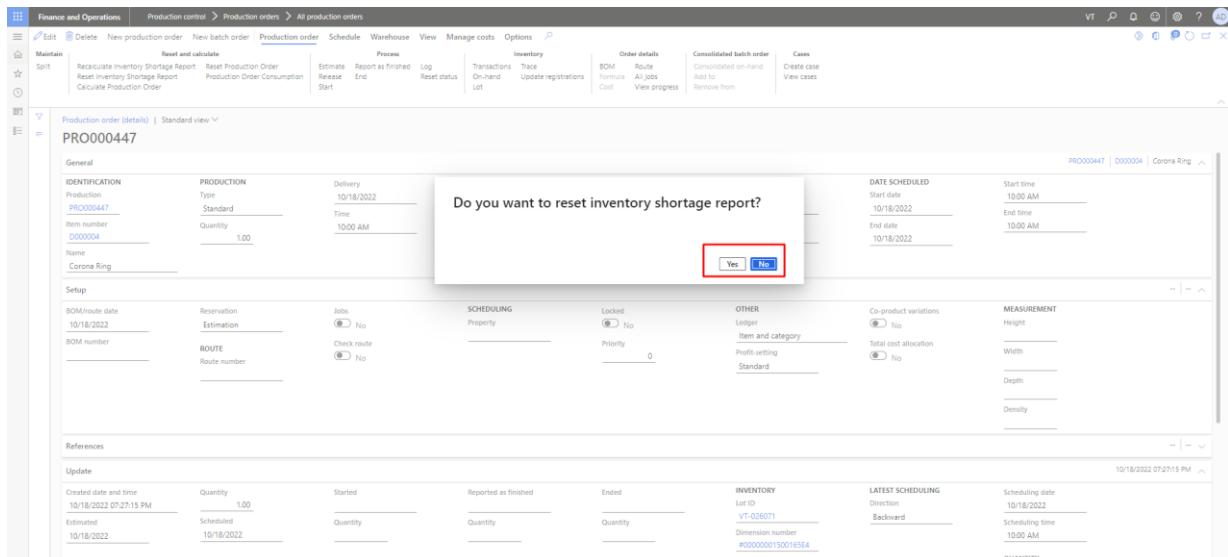


Figure 40 Reset Inventory Shortage Report

The user will receive the access the success message (Inventory Shortage Report has been Successfully reset).

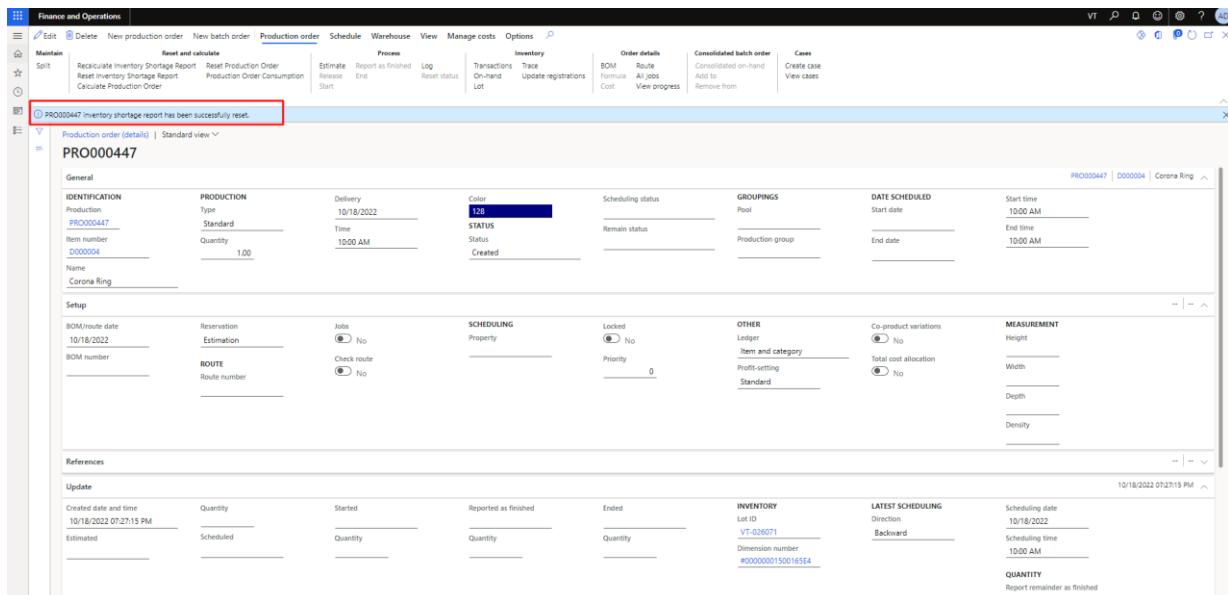


Figure 41 Success Message of Reset Inventory Shortage Report



The user will receive the access the Failure message (Please wait for the process to end), If the any of the job is already in the queue.

Finance and Operations Production control > Production orders > All production orders

Edit		New production order	New batch order	Production order	Schedule	Warehouse	View	Manage costs	Options
Maintain		Reset and calculate		Process		Inventory		Order details	
Split		Recalculates Inventory Shortage Report		Estimate Release Start		Transactions Log Reset status		BOM Route	
Delete		Reset Production Order		Report as finished		Trace On-hand Lot		Formula All jobs	
		Reset Inventory Shortage Report		Reset Start		Update registrations		Cost View progress	
		Calculate Production Order						Consolidated batch order	
								Consolidated on-hand Add to Remove from	
								Case Create case View cases	
PRO0000447 (Corona Ring) calculation was started by HCININFO at 10/18/2022 02:56:09 pm. Please wait for the process to end.									
Production order (details) Standard view									
PRO000447									
General									
IDENTIFICATION	PRODUCTION	Delivery	Color	Scheduling status	GROUPLINGS	DATE SCHEDULED	start time		
Production PRO000447	Type Standard	10/18/2022	128	Operations scheduled	Pool	Start date 10/18/2022	10:00 AM		
Item number D000004	Quantity 1.00	Time 10:00 AM	Status Scheduled	Remain status Report as finished	Production group	End date 10/18/2022	End time 10:00 AM		
Name Corona Ring									
Setup									
BOM/route date 10/18/2022	Reservation Estimation	Jobs <input checked="" type="radio"/> No	SCHEDULING	Locked <input checked="" type="radio"/> No	OTHER	Co-product variations <input checked="" type="radio"/> No	MEASUREMENT		
BOM number		Check route <input checked="" type="radio"/> No	Property	Priority 0	Ledger Item and category	Total cost allocation <input checked="" type="radio"/> No	Height		
					Profit-setting Standard		Width		
							Depth		
							Density		
References									
Update									
Created date and time 10/18/2022 07:27:15 PM	Quantity 1.00	Started	Reported as finished	Ended	INVENTORY	LATEST SCHEDULING	Scheduling date 10/18/2022		
Estimated 10/18/2022	Scheduled 10/18/2022	Quantity	Quantity	Quantity	Lot ID YT-026071	Direction Backward	Scheduling time 10:00 AM		
					Dimension number				

Figure 42 Wait Message If the already job in Queue



7.3 Manual Calculation of the production order

The user can perform this process in step by step. We have following status/steps “Created”, “Estimated”, “Scheduling”, “Releasing”, “End”. The user has to access the production page to create the production order. The user needs to click on the “Create Production Order” to create any new production order. This process is already highlighted in the **Figure 7**.

7.3.1 Estimation of the production order

In **step 3**, the user needs to go production order then click on “estimate” to calculate the estimation of the item. It will calculate the estimation of the product. As the user will click on it then need to fill update data on the popup form to calculate the estimation. This process is already highlighted in the **Figure 43 and 44**.

The screenshot shows the Dynamics 365 Production Order maintenance screen. The top navigation bar includes options like New production order, New batch order, Selection list, Reset and calculate, Recalculate Inventory Shortage Report, Calculate Production Order, Production Order Consumption, Estimate (highlighted with a red box), Report as finished, Release, End, Log, Process, Reset status, Batch balancing, Transactions, Trace, Update registrations, Inventory, On-hand, Lot, BOM Formula, Cost Route, All jobs, Production details, Consolidated batch order, Create case, and Cases. The main grid displays production orders with columns for Production, Name, Product number, Item number, Quantity, Delivery, Status, Remain status, Release to warehouse, and Base Production. One row in the grid is highlighted with a red box around the 'Status' column, which shows 'Estimated'.

Figure 43 Estimation of the Production Order

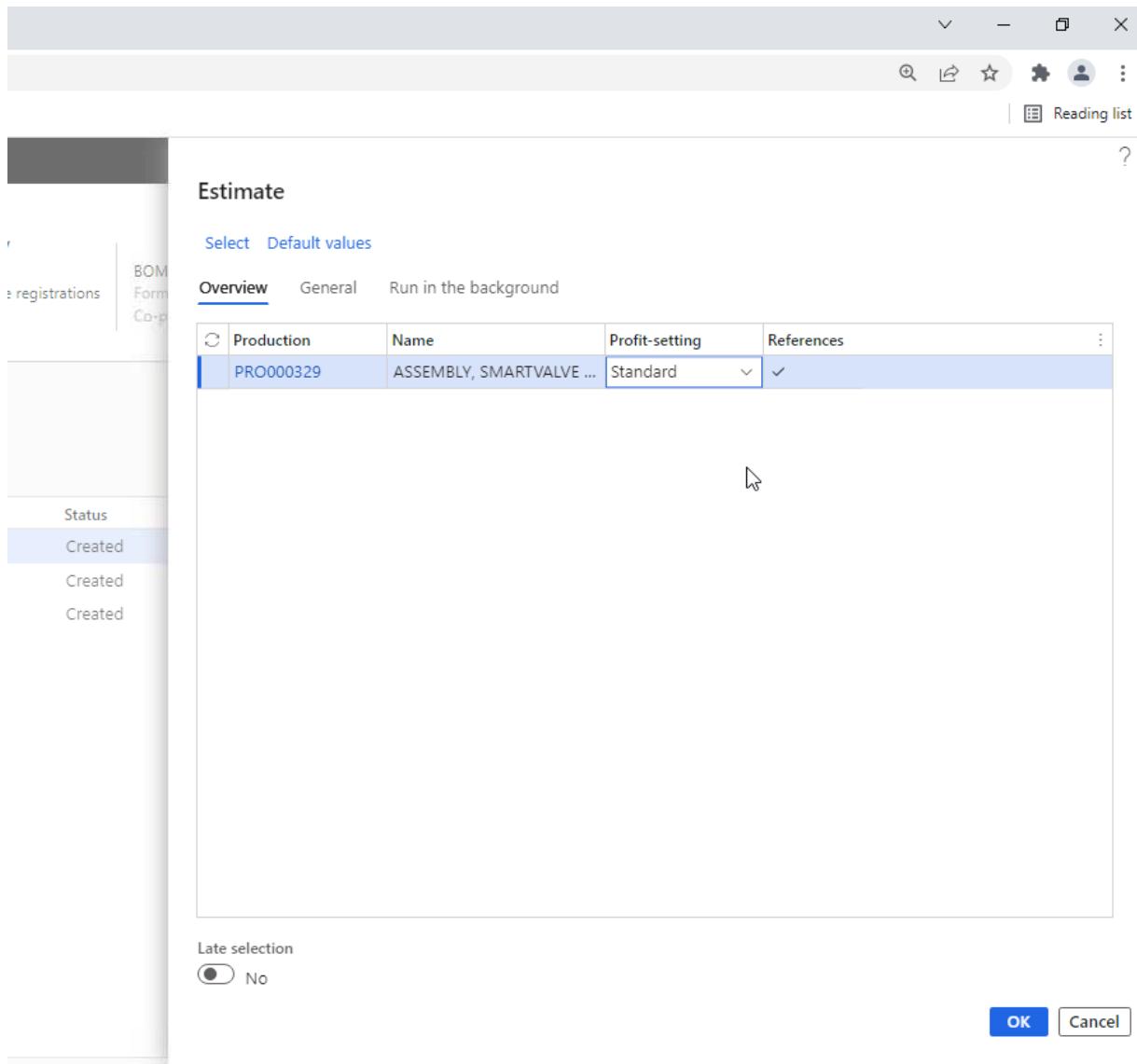


Figure 44 Estimate the values

7.3.2 Scheduling of the Production Order

In **step 3**, the user needs to go “Schedule” then click on “Schedule Operations” to send the item. It will calculate the estimation of the product. As the user will click on it then need to fill update data on the popup form to calculate the estimation. This process is already highlighted in the **Figure 45,46, 47 and 48**.

All production orders

My view (1) ▾

Production	Name	Product number	Item number	Quantity	Delivery	Status	Remain status	Release to warehouse	Base Production...
PRO000362	PLC - ASSEMBLY, DC-DC, POWERLINE COORDINATOR, PLC V2	P115424 : 2 :: -	P11542	5.00	5/20/2022	Scheduled	Material consumption	Allow partial reservat...	<input checked="" type="checkbox"/>
PRO000337	NGET (21)	P11934 : -7 :: NGT-001	P11934	21.00	12/18/2022	Scheduled	Material consumption	Allow partial reservat...	<input checked="" type="checkbox"/>
PRO000336	ISA Co-Cost (26)	P11934 : -7 :: ISA-001	P11934	26.00	11/27/2022	Scheduled	Material consumption	Allow partial reservat...	<input checked="" type="checkbox"/>
PRO000323	FAI - SMARTVALVE 10-1800	P11934 : -7 :: FAI-001	P11934	1.00	7/25/2022	Scheduled	Material consumption	Allow partial reservat...	<input checked="" type="checkbox"/>
PRO000317	P4 - SMARTVALVE 10-1800	P11934 : -5 :: 001517	P11934	1.00	2/18/2022	Ended	Ended	Allow partial reservat...	<input checked="" type="checkbox"/>

Total

Figure 45 Scheduling of the Production Order

Production order (details)

PRO000191

General

IDENTIFICATION	PRODUCTION	DELIVERY	STATUS	GROUPINGS	DATE SCHEDULED
Production PRO000191	Type Standard	Delivery 11/19/2021	Status Created	Remain status Quality order status	Start date
Item number P114450	Quantity 1.00	Time 10:00 AM	Scheduling status	Pool Production group	End date
Name P4 - 1 MVAR, SMARTVALVE, 1...	Color 128	Color			Start time 12:00 AM

Setup

BOM/route date 11/19/2021	ROUTE	SCHEDULING	OTHER	Co-product variations	MEASUREMENT
BOM number B001023	Route number	Property Jobs	Ledger Item and category	No	Height Width
Reservation Estimation	Locked No	Locked No	Profit-setting Standard	Total cost allocation No	Depth Density
	Check route No	Priority 0			

References

ITEM REFERENCE	Reference number	PLANNED-ORDER REFERENCE	SUMMARY REFERENCE	ORIGIN
Reference type		Master plan	Reference production PRO000191	Original production
Reference lot		Number	Reference level 0	

Update

Created date and time 11/4/2021 05:07:46 PM	Quantity	Started	Reported as finished	Ended	INVENTORY	LATEST SCHEDULING
Estimated	Scheduled	Quantity	Quantity	Quantity	Lot ID VT-006291	Direction

Figure 46 Navigate to 'Schedule' tab and select Schedule Operations

7.3.2.1 Operations Scheduling Parameters

Enter the required parameters for operations scheduling. The direction of scheduling is important to scheduling process.

- Set Scheduling direction to ‘Backward from delivery date’
- Recalculate BOM levels to Yes
- Finite Material to Yes
- Press Ok

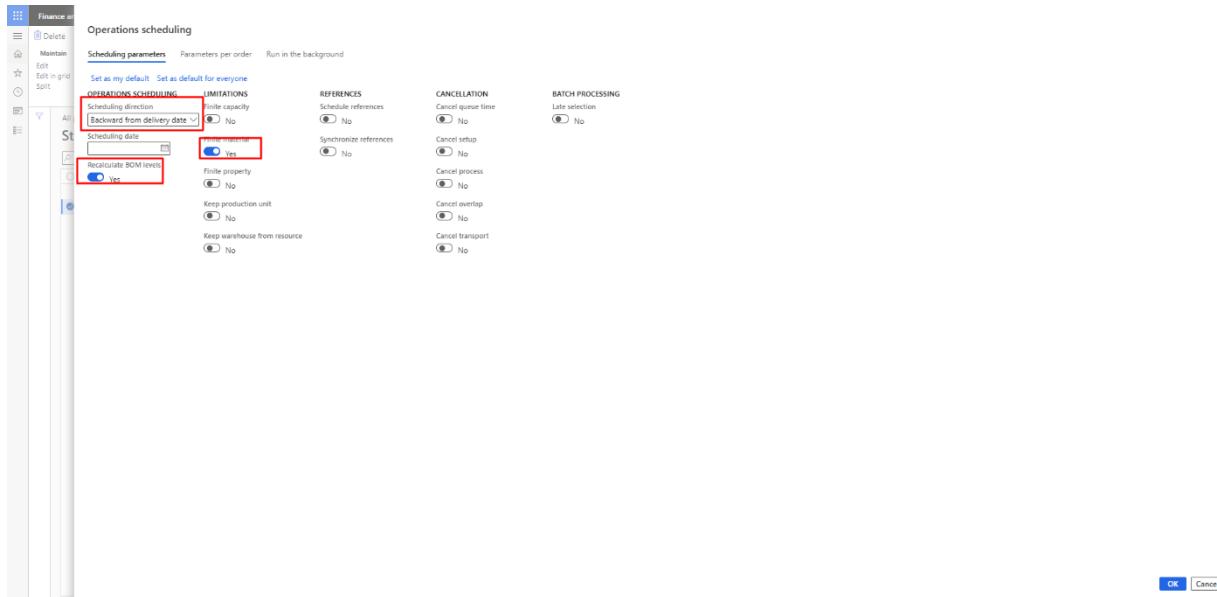


Figure 47 Add parameters in Operations scheduling

Product number	Item number	CW quantity	CW unit	Quantity	Report ref...	Delivery	Status	Remain status	Reference type	Pool	Locked for...	Release to warehouse	Base Production Or...	Base Prod...
PRO000451 P100096 :0:-	P100096	1.00	1.00	10/20/2022	Scheduled			Report as finished				Allow partial reservation		
PRO000447 00000041 :A:-	D000004	1.00	1.00	10/18/2022	Created							Allow partial reservation		
PRO000441 P111934 :7:-SA-001	P111934	26.00	26.00	7/3/2022	Scheduled				Material consumption			Allow partial reservation		
PRO000431 P116086 :0:-	P116086	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000430 P114464 :1:-	P114464	5.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000429 P113751 :3:-	P113751	5.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000427 P115918 :3:-	P115918	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000426 P115063 :2:-	P115063	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000425 P115062 :2:-	P115062	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000424 P115041 :4:-	P115041	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000423 P114456 :1:-	P114456	2.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000422 P111931 :4:-00517	P111931	1.00		5/26/2022	Ended	Ended						Allow partial reservation		
PRO000421 P116278 :2:-	P116278	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000420 P115907 :1:-	P115907	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000419 P115739 :4:-	P115739	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000418 P115216 :1:-	P115216	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000417 P115053 :0:-	P115053	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000416 P115050 :1:-	P115050	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000415 P114913 :2:-	P114913	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000414 P114820 :1:-	P114820	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000413 P114450 :3:-	P114450	10.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000412 P112922 :2:-	P112922	1.00		5/26/2022	Ended	Ended	Production line					Allow partial reservation		
PRO000411 P115876 :3:-	P115876	10.00		5/26/2022	Ended	Ended						Allow partial reservation		

Figure 48 Production Scheduling Completed

7.3.3 Release of the production order

In step 4, the user needs to go production order then click on “release” to forward the item to release. It will forward the item to release. As the user will click on it then need to fill update data on the popup form to calculate the estimation. This process is already highlighted in the **Figure 49 and 50**.

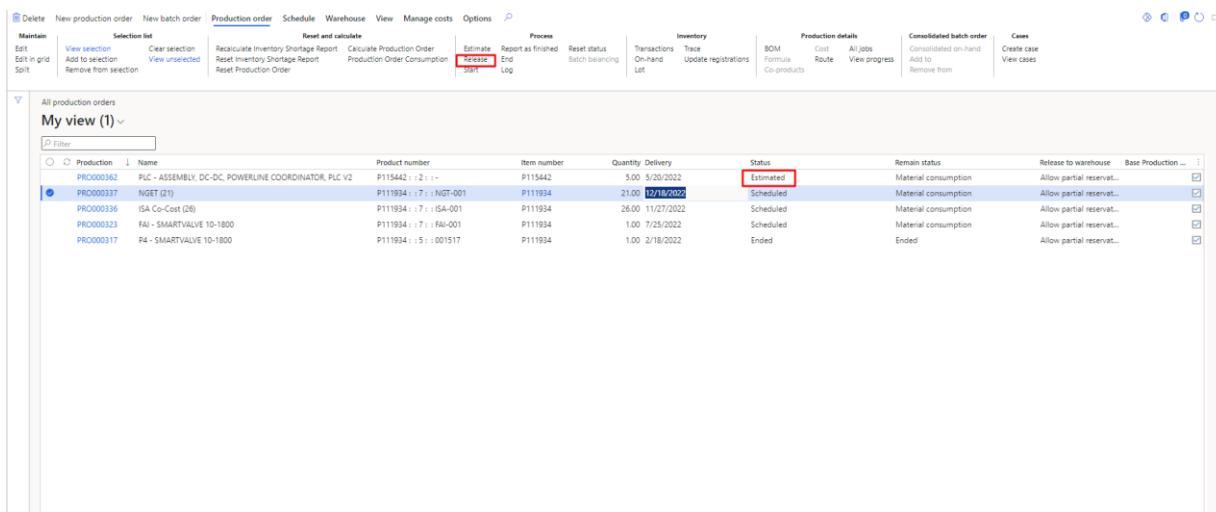


Figure 49 Release of the Production Order

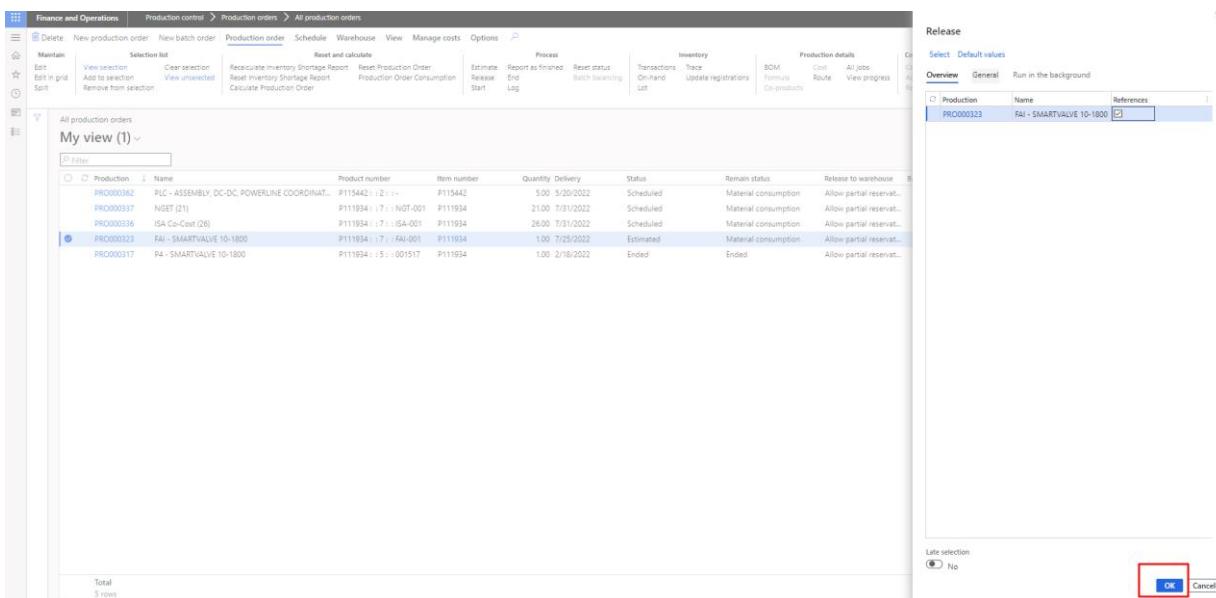


Figure 50 Confirm Data and Press OK

7.3.4 Reset Status

The user can also reset the status manually. User need to follow the flow (Release, Scheduling, Estimate) to reset. This process is already highlighted in the **Figure 51 and 52**.

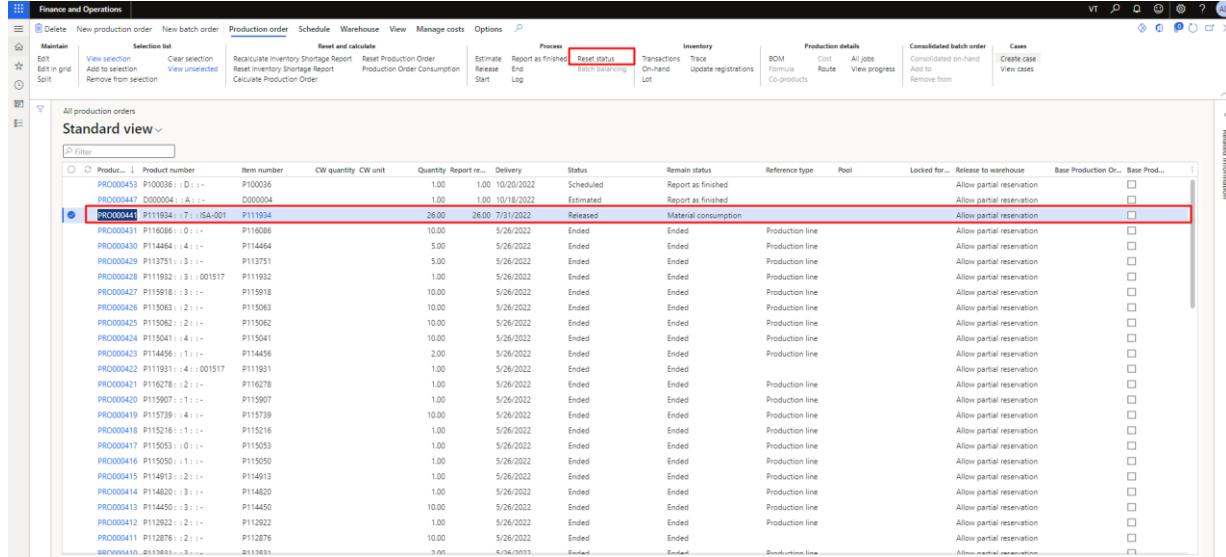


Figure 51 Reset Status

The user needs to select the status to reset. In the below Figure can see status Release to Scheduled id changed.

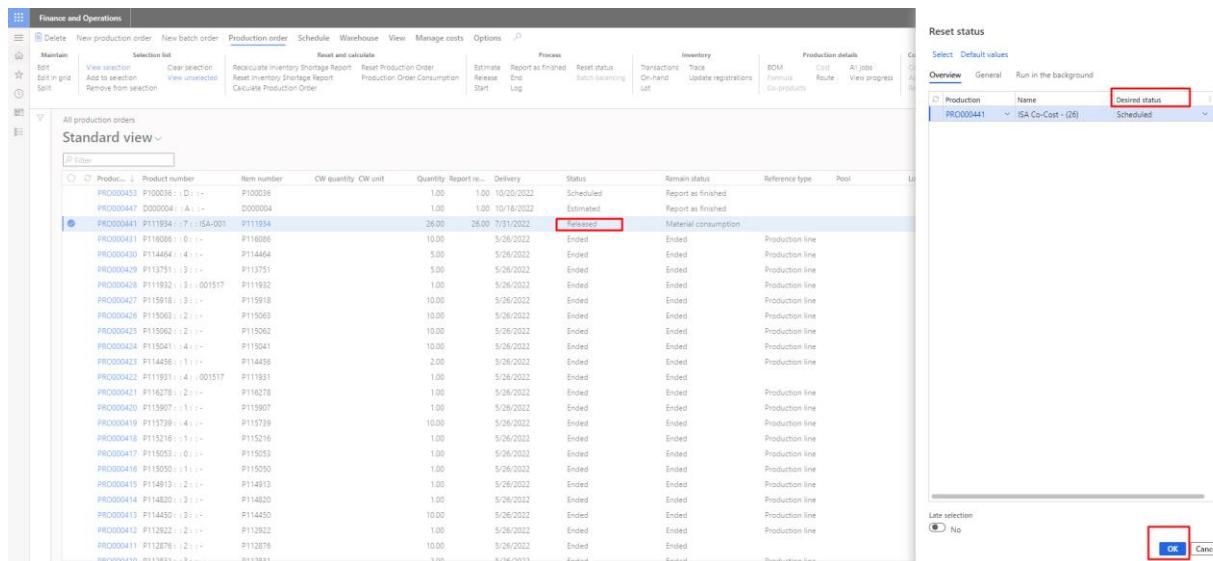


Figure 52 Select Status to Reset Status



7.3.5 End of the production order

In step 5, the user needs to go production order then click on “End” to do the item order end. It will ended the production order. As the user will click on it then need to fill update data on the popup form to calculate the estimation. This process is already highlighted in the **Figure 53, 54 and 55**.

The screenshot shows the 'Production order' screen in Dynamics 365. The top navigation bar includes 'Finance and Operations', 'Delete', 'New production order', 'New batch order', 'Production order' (which is selected), 'Schedule', 'Warehouse', 'View', 'Manage costs', and 'Options'. Under 'Production order', there are buttons for 'Recalculate Inventory Shortage Report', 'Calculate Production Order', 'Reset as finished', 'Report as finished', 'Release Start', 'End Log', 'Reset status', 'Batch balancing', 'Transactions', 'On-hand', 'Trace', 'Lot', 'Inventory', 'BOM', 'Formula', 'Co-products', 'Production details', 'Cost', 'Route', 'All jobs', 'View progress', 'Consolidated batch order', 'Consolidated on-hand', 'Add to', 'Remove from', and 'Cases'. A red box highlights the 'End Log' button. The main area displays a grid of production orders with columns for Production, Product number, Item number, CW quantity, CW unit, Quantity, Report remain..., Delivery, Status, Remain status, Reference type, and a 'Related information' column. One row is selected, showing PRO000362 with a status of 'Scheduled'.

Figure 53 End of the production Order

This screenshot shows the same 'Production order' screen as Figure 53. A confirmation dialog box titled 'End' is overlaid on the right side of the screen. The dialog has tabs for 'Select', 'Default values', and 'Overview'. It displays a table with columns for Production, Name, Date, and Rep. One row is selected, showing PRO000323. At the bottom of the dialog are 'OK' and 'Cancel' buttons, with 'OK' being highlighted by a red box.

Figure 54 Confirm Data and Press OK

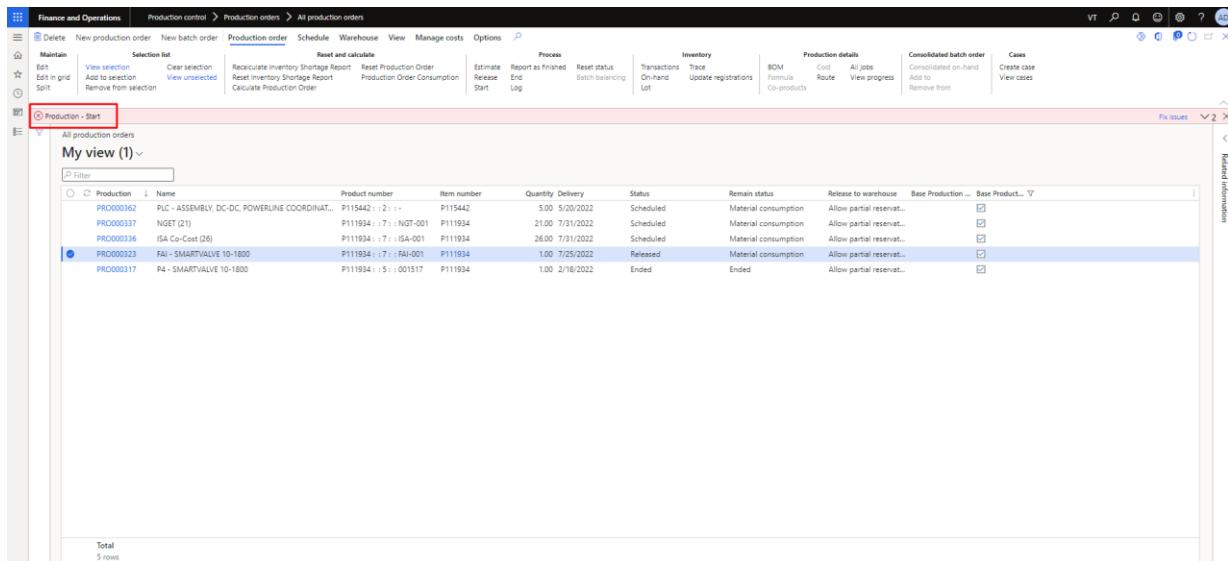


Figure 55 Production Order Ended

8 Personalization

8.1 Add columns

8.1.1 Select Column Header

To personalize the production orders page, select insert columns option.

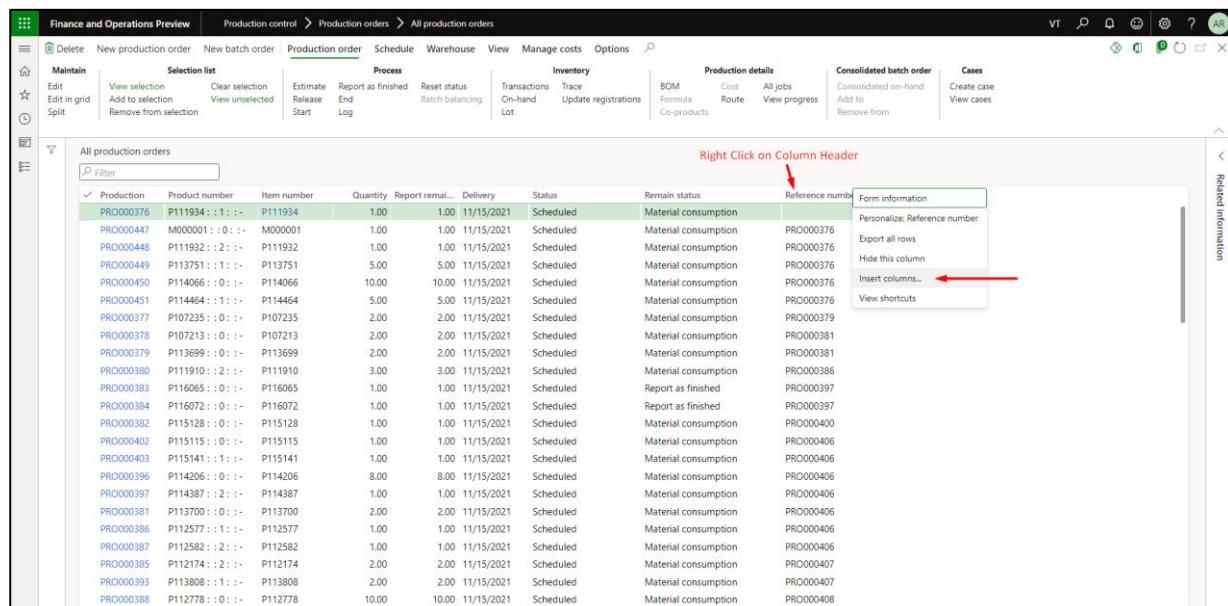


Figure 56 Right click on column header and select 'Insert columns'

8.1.2 Select Required Columns and Update

Choose the required fields you want to display in the all production orders page.

The screenshot shows the 'Finance and Operations Preview' interface in Dynamics 365. The main area displays a grid of 'All production orders' with columns for Production ID, Product number, Item number, Quantity, Report remain..., Delivery, Status, Remain status, and Reference n... . A red arrow points from the 'Name' column in the grid to the 'Name' column in the 'Insert columns' dialog box. The 'Insert columns' dialog box lists various fields under 'All fields' and 'Recommended fields'. The 'Name' field is checked (indicated by a green background and a red arrow). The 'Update' button is highlighted with a red arrow.

Production	Product number	Item number	Quantity	Report remain...	Delivery	Status	Remain status	Reference n...
PRO000376	P111934::1:-	P111934	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000376
PRO000447	M000001::0:-	M000001	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000376
PRO000448	P111932::2:-	P111932	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000376
PRO000449	P113751::1:-	P113751	5.00	5.00	11/15/2021	Scheduled	Material consumption	PRO000376
PRO000450	P114066::0:-	P114066	10.00	10.00	11/15/2021	Scheduled	Material consumption	PRO000376
PRO000451	P114464::1:-	P114464	5.00	5.00	11/15/2021	Scheduled	Material consumption	PRO000376
PRO000377	P107235::0:-	P107235	2.00	2.00	11/15/2021	Scheduled	Material consumption	PRO000379
PRO000378	P107213::0:-	P107213	2.00	2.00	11/15/2021	Scheduled	Material consumption	PRO000381
PRO000379	P113699::0:-	P113699	2.00	2.00	11/15/2021	Scheduled	Material consumption	PRO000381
PRO000380	P111910::2:-	P111910	3.00	3.00	11/15/2021	Scheduled	Material consumption	PRO000380
PRO000383	P116065::0:-	P116065	1.00	1.00	11/15/2021	Scheduled	Report as finished	PRO000397
PRO000384	P116072::0:-	P116072	1.00	1.00	11/15/2021	Scheduled	Report as finished	PRO000397
PRO000382	P115128::0:-	P115128	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000400
PRO000402	P115115::0:-	P115115	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000403
PRO000403	P115141::1:-	P115141	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000406
PRO000396	P114206::0:-	P114206	8.00	8.00	11/15/2021	Scheduled	Material consumption	PRO000406
PRO000397	P114387::2:-	P114387	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000406
PRO000381	P113700::0:-	P113700	2.00	2.00	11/15/2021	Scheduled	Material consumption	PRO000406
PRO000386	P112577::1:-	P112577	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000406
PRO000387	P112582::2:-	P112582	1.00	1.00	11/15/2021	Scheduled	Material consumption	PRO000406
PRO000385	P112174::2:-	P112174	2.00	2.00	11/15/2021	Scheduled	Material consumption	PRO000407
PRO000393	P113808::1:-	P113808	2.00	2.00	11/15/2021	Scheduled	Material consumption	PRO000407
PRO000388	P112778::0:-	P112778	10.00	10.00	11/15/2021	Scheduled	Material consumption	PRO000408

Figure 57 Choose the columns you want to add

8.2 Hide User Control

8.2.1 Select Control to Hide

There are some of the fields that are hidden in the create new production order panel. Right click on the panel and select Personalize.

The screenshot shows the 'Create production order' screen. In the 'SETUP' section, the 'Item' field has a red arrow pointing to it. A context menu is open over this field, with the 'Personalize' option highlighted. Other options visible in the menu include 'Setup', 'Skip', 'Lock', '+ Add a field', and 'Hide'. The 'Hide' option is also highlighted with a red box.

Figure 58 Select the field you want to hide

8.2.2 Apply Hide Control

Hide the fields, you don't want to display in the create production order panel.

The screenshot shows the 'Create production order' screen. In the 'SETUP' section, the 'Item' field has a red arrow pointing to it. A context menu is open over this field, with the 'Personalize' option highlighted. Below 'Personalize', there is a checked checkbox labeled 'Hide'. Other options visible in the menu include 'Setup', 'Skip', 'Lock', '+ Add a field', and 'Personalize this page'. The 'Hide' checkbox is also highlighted with a red box.

Figure 59 Tick the check box of Hide

8.3 Rename Label

8.3.1 Personalize Label

If you want to rename any field name, right click on the panel and select the personalize

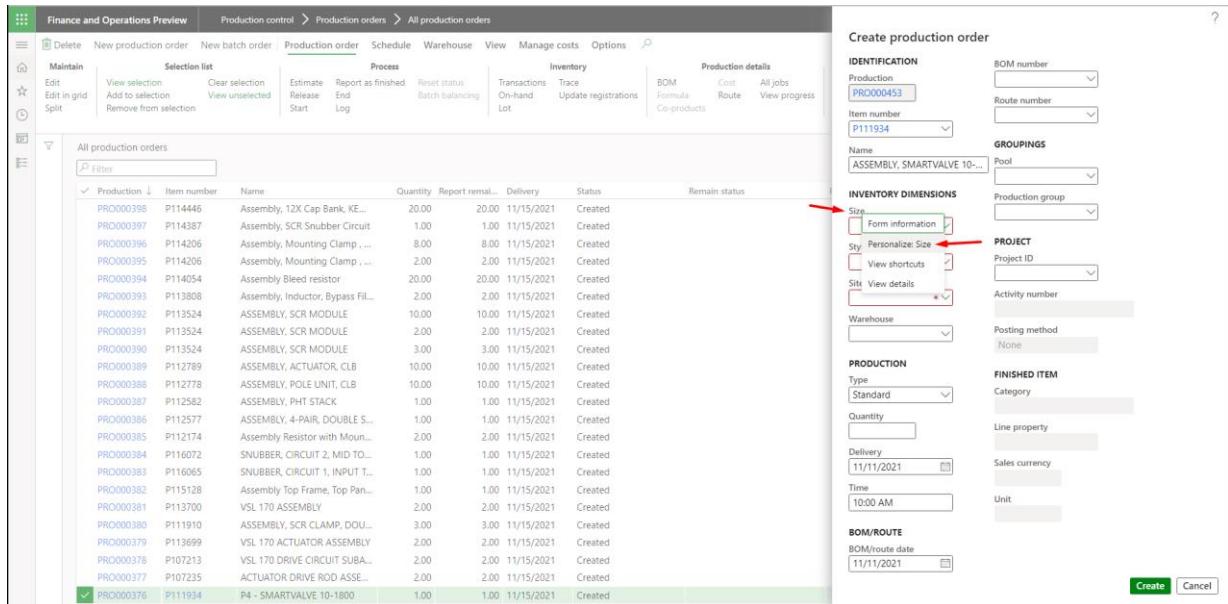


Figure 60 Select the Field You Want to Rename

8.3.2 Update Label Text

Rename the new field in the personalize box as shown in the figure below.

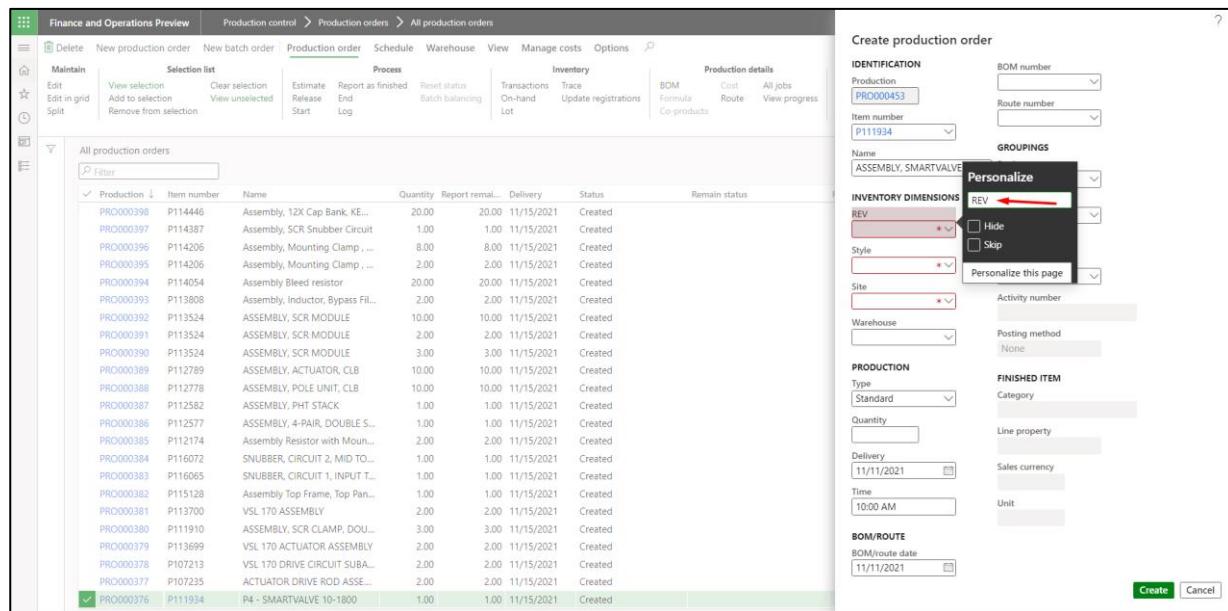


Figure 61 Enter the new field name

8.4 Favorites

8.4.1 Add to Favorites

Click the star on the option you want to include in 'Favorites' category

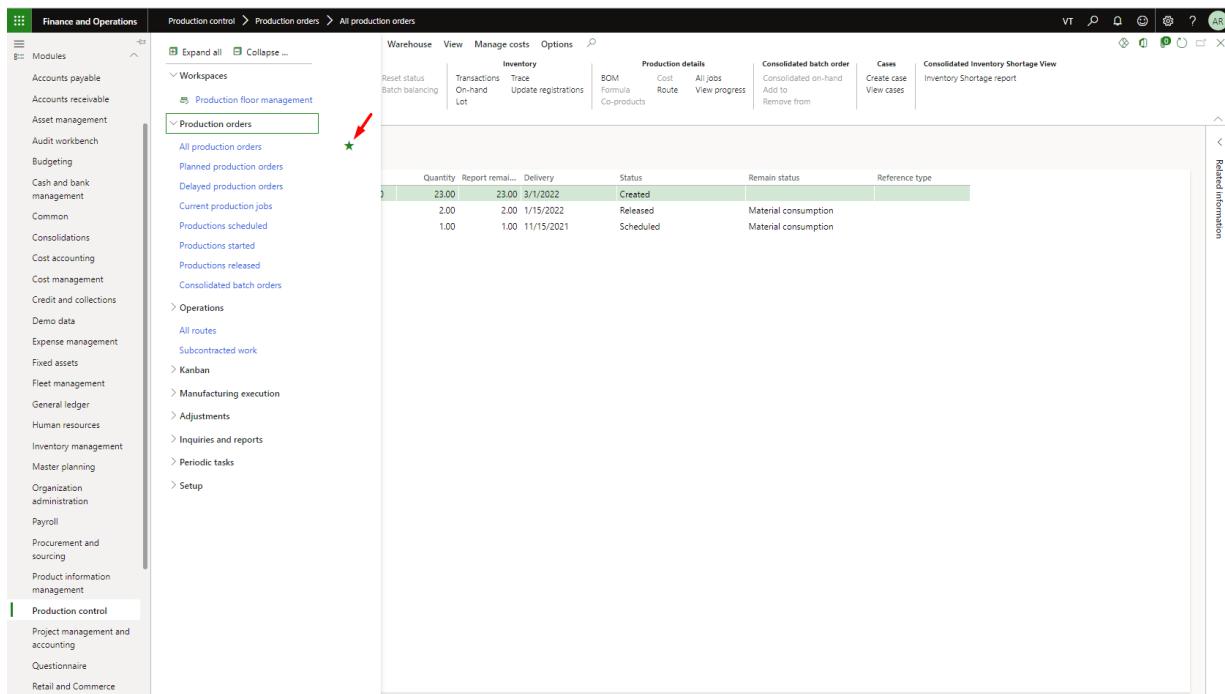


Figure 62 Add to Favorites

8.4.2 Remove from Favorites

To remove any option from ‘Favorites’ category, click on star from Favorites menu

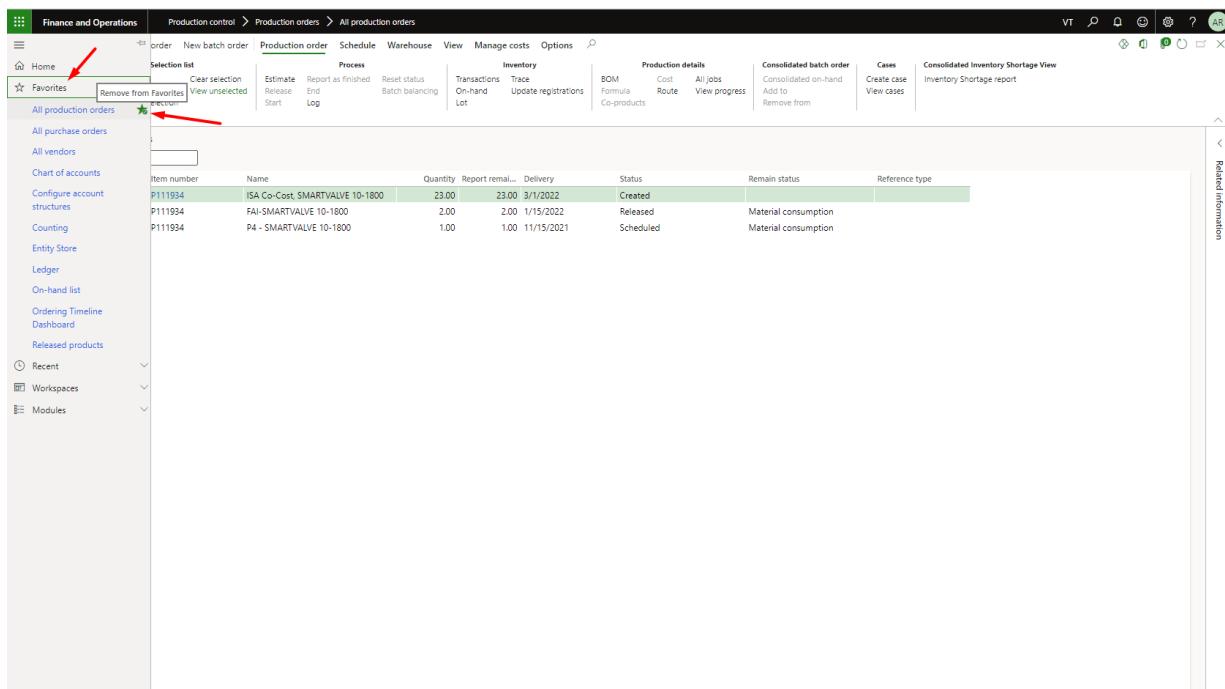


Figure 63 Remove from Favorites