

Visual Streamline FAQ

Production Ticket Processing

Setup Requirements:

Business Rule Inv # 52 must be enabled to turn on the Production Ticket Module.

Assembled item must be flagged to Purchase Raw Materials, and the Production Item flag must be enabled also in the Product Master File

The Assembled item must be linked to an INTERNAL vendor

Internal vendor is flagged via a flag in the supplier master file

Processing Requirements:

The general reason behind using production tickets is to generate an internal document that will trigger the build of an assembled kits and track raw materials requirements for it. This can be requirements for a customer's order, or to keep enough of the Assembled item stocked on the shelf to meet min max or Rop/eq requirements.

Explanation of Flags in Planned Po Processing:

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Planned Purchase Order Preparation

Buyer Code All

Job Code

Range Options

☐ Include All Products

From Product Line TELMA To TELMA

From Product To

☒ Include All Orders

From Order To

☒ Include All Suppliers ☐ Selected Suppliers

From Supplier To

☒ Include All Warehouses ☐ Selected Warehouses

From Warehouse To

Selection Options

☐ Drop Ship Orders ☐ Alternate Supplier Only

☒ Production Items ☒ Include Raw Materials in Run

☐ Include Special Order Items ☐ Include CribMaster Requirements

☒ Include Backorders

☒ Include Items for Stock

Buy Up Factor 1.00

P/O Ship-To

Forecasting Ok Cancel

Enter Authorized Employee Number TROCHA Modify ZOOM WIDE INS

start Visual Streamline Streamline [T59] Streamline Co... Project Timer (... Document1 - ...

To create PT for Customer orders:

If you want the system to pick up the requirements based on the sales order that was entered into the system, you need to run PPP with above settings. Note – running PPP for Production items only will not trigger system to pick up requirements for order. You need to include both Production Items and Include Back orders.

To have system check for requirements for raw materials outside of PT:

The Include Raw Materials in Run will pickup the stock requirements for the raw materials as well as the requirements for the sales order. It must be checked in addition to the Include Items for Stock. If you only include Raw Materials in Run, it will not pick up stock requirements for raw materials.

To create PT for Stock levels for Assembled item:

If you want to have the system create a PT for the min max or rop/eq qty's on an Assembled item, you must check the Production Items Flag, as well as the Include Items for Stock.

Production Tickets to fulfill Customer Orders Example:

The next few pages will take you through the creation of a Product Ticket to fulfill a Customer order.

Create a sales order for the production item see print screen below.

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Order Entry for BASE PRODUCTION TEST Current O/P Register

Doc: OE: Order Entry Number: 00068397 Date: 04-Oct-2010 Branch: 00413 Job:

Customer: 999 changed name changed oct 2 changed oct 2 Kitchener ON, Canada

Order Type: Required By: 11/15/2010 Rush Order: ☐ On Hold: ☐

Cust P/O#: Rel.#: Open Unprinted

#	Ty	Product Code	Description	Whs	UOM	Qty Ord	Qty Ship	Qty B/O	Price	Disc.	Extension
1	P	PROD	TESTING PRODUCTIO	413	EA	1	0	1	\$1,000.0000	0.00	\$1,000.00

Summary

SubTotal: \$1,000.00
Discount: \$0.00
(+) ecofee: \$0.00
(+) Freight: \$100.00
(+) 13.0% HST: \$143.00
(+) 0.00% PST: \$0.00
(=) Total Order: \$1,243.00

Order Information

Payment Methods: On Account
Ship Via: TEST
FOB: Testing
Freight Terms: ☐ Pick Up ☐ Cash Sales ☐ Customer Quoted ☐

Buttons: Find, Options, View, New Order, Margins, Prev. Rev., Print Order, Next Rev., Create P/O, Modify, Close CSO, Cancel Order, Exit

Buttons: Ord Comments, Std Comments, Notes

Buttons: Auth, POD

Enter Customer Code: TROCHA Query ZOOM WIDE INS

Planned Po must then be run to generate the PT ticket and/or Raw material requirements to fill this order.



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Production Run Planning

Supplier Code	Product Code	Description
9999	PRODR1	TESTING PRODUCT TICKET
9999	PRODR2	TESTING PRODUCTION TICKET
INTERNAL	PROD	TESTING PRODUCTION TICKET PROCESSING

Stock Type : Stock Item

Notes Colour Legend

Add Line Delete Item Source Details Warehouses Transfer Movement Purchases Supplier Sup. Qty Brks Print Report Change View

Purchase Order Information

Product Line TELMA Telma's product

Supplier 9999 Telma rocha

Carrier LOOMIS LOOMIS

Currency CDN Canadian Dollar

Purchase UOM EA Each

Purchase Qty 1 No minimum P/O Quantity

Purchase Cost \$2.0000

Lead Time 300

Expected Date 07/31/2011 Display Zero Cost Warning ☒

Transfer Qty 0 Auto Link With Open P/Os

Supplier information

Minimum P/O Value \$300.0000 Actual \$ \$6.0000

Minimum PP Freight \$25.0000

Minimum P/O Qty 0.000 Actual 3.000

Minimum Volume 0.000000 Actual 0.000000

Minimum Weight 50000.000000 Actual

Inventory Information

On Hand 0 MTD Units 0

Committed 0 YTD Units 0

Committed Transfers 0 Main Whs 413

Production Required 2

Available 2

Scheduled 0

On P.O. 0

On P.O. Requisition 0

Transfer On Order 0

In Transit 0

In Production 0

Production Reserved 0

EOQ/ROP

Reorder Point 0.0000

EOQ 0.0000

Reserve Stock Undo Transfer Options > Validate Preview P/O Preview All Generate Exit

Please Enter Product Code TROCHA Modify ZOOM WIDE INS

start

Inbox - Micros...

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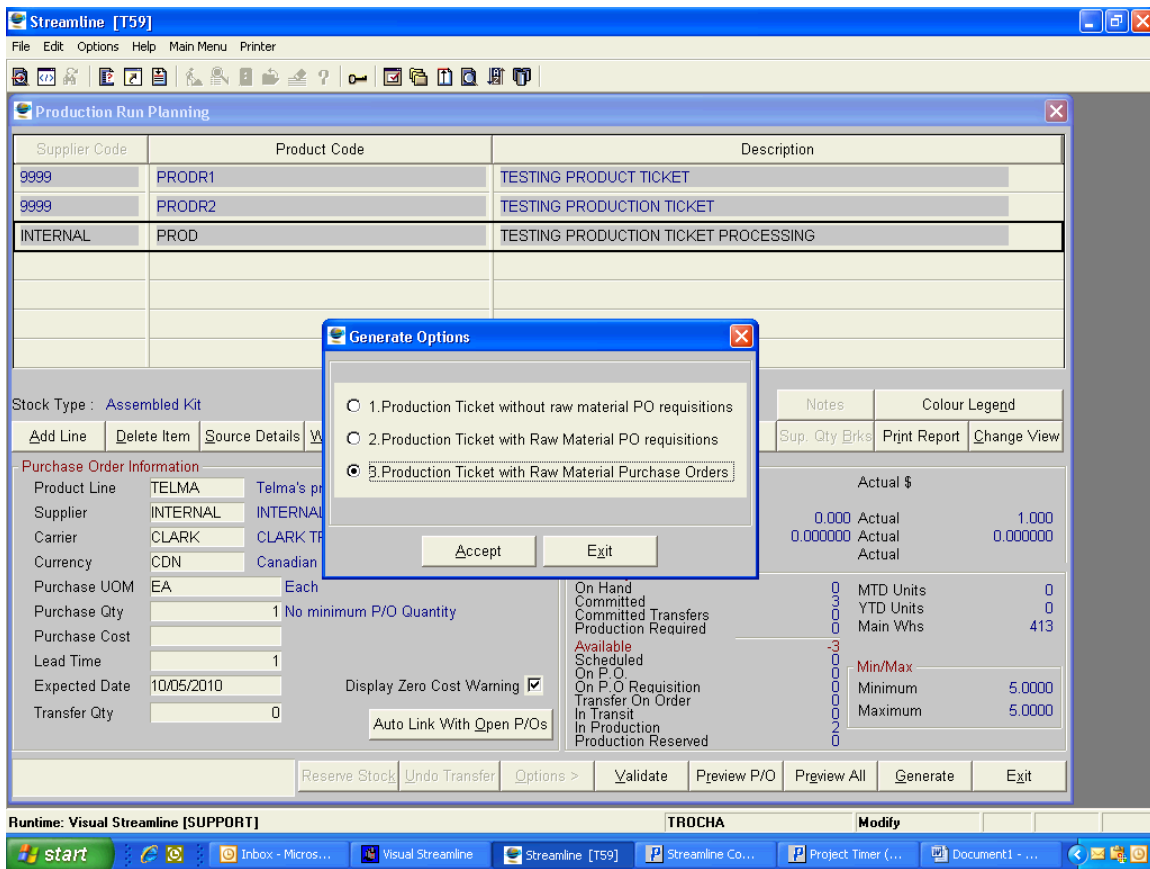
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PROD is the ASSEMBLED ITEM it shows up in Black

PRODR1 and PRODR2 are the raw materials that are on the Assembled item and they show up in Blue.

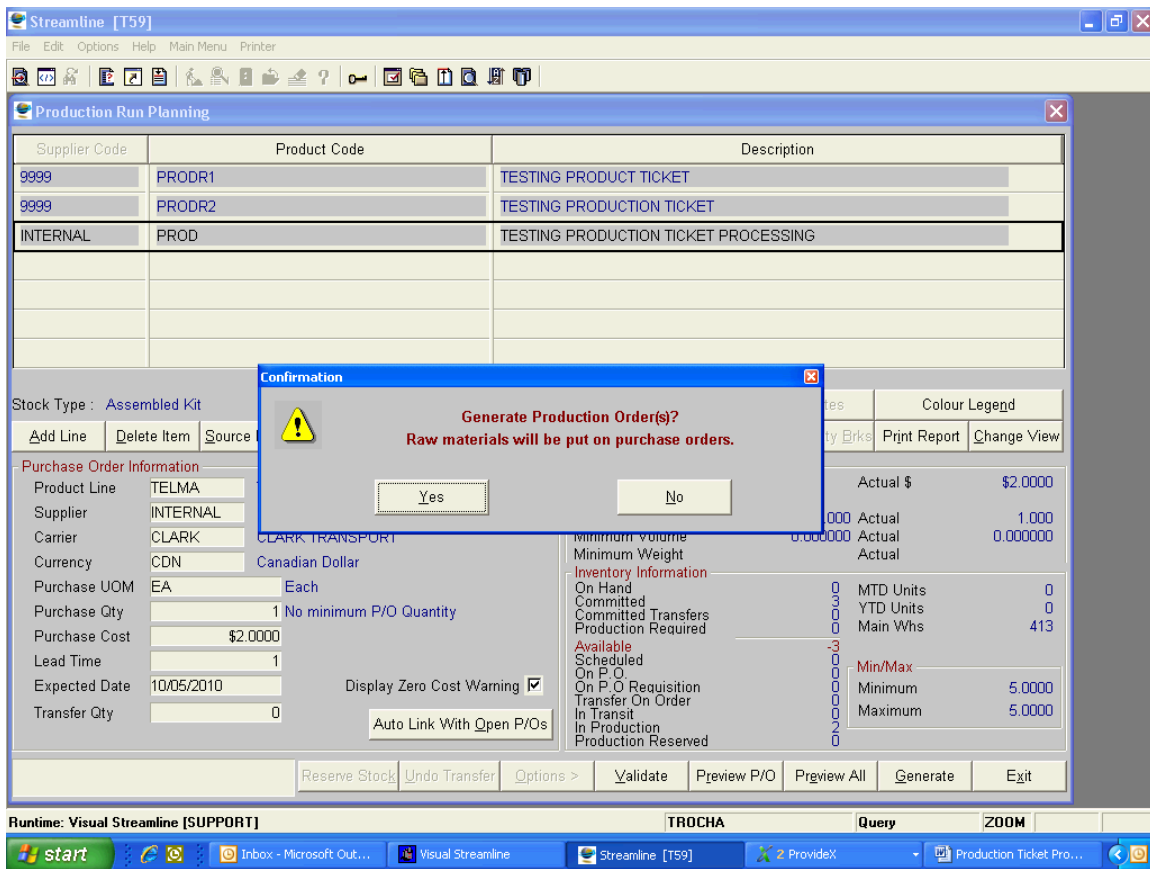


You can reserve stock qty's on hand to the product ticket also. This can be done by using the auto link with Open PO's button.

Upon clicking on the Generate Button the above Generate Options will appear:

1. Creates a production ticket only with NO raw materials requirement
2. Creates a product ticket and also creates the raw materials requirement as requisition
3. Creates a production ticket and also creates raw materials requirements as po

For the purpose of this document, we will be creating both Production Ticket and Raw Material requirements.



Confirmation message comes up – click YES