

Production Order – Connect jobs with the Project field

Overview:

OPTO has a Project feature that allows multiple jobs to be linked at a main job. The project job will report costs for all linked jobs, whilst allowing the individual jobs to be run separately.

To Create a Project

From the OPTO ribbon, select the 'Orders' tab and **click** on 'New Factory Order' or 'Edit Factory Order' to open the corresponding window. This order will be the main job called the Project Job, enter a project name in the **Project** field (1) and the order number in the **Project Job** field (2).

The screenshot displays the 'Edit Factory Order' window. Key fields include:

- Order No: 1189
- Client Code: ITMS
- Client Name: ITMS SOFTWARE SERVICES PTY LTD
- Job Desc: MISC TEST
- Project: New Project - Project (highlighted with a red box)
- Project Job: 1189 (highlighted with a red box)

Part Code	Description	Ord ...	Desp	Info	Unit Price	Total Unit	Due Date	Tax
MISC_TEST	MISC TEST	1			4.0000	4.00	19/03/18	2

Summary Totals:

- Total (Ex): \$4.00
- Tax: \$1.86
- Total (Inc): \$5.86

Status: NO DESPATCHES, JOB IS ACTIVE - STARTED, - Job Ticket's NOT printed -

Press <F9> when finished to save.

Open an existing order or create a subsequent order that needs to be linked to the main order 'Project Job'. Then enter the project job's order number in the **Project Job** field and **press <TAB>**, the project name will appear in the **Project** field. **Press <F9>** to save.

Order No: 1189 Client Code: ITMS Client Name: ITMS SOFTWARE SERVICES PTY LTD Contact Name: Type: PR

Date Entered: 14/03/2018 Date Received: Emp No: 1 Robert JONES

Client Order No: Job Desc: MISC TEST

Project: New Project - Project

Part Code	Description	Ord ...	Desp	Info	Unit Price	Total Unit	Due Date	Tax
MISC_TEST	MISC TEST	1			4.0000	4.00	19/03/18	2

Summary: Total (Ex) \$4.00 Tax \$1.86 Total (Inc) \$5.86

Multiple orders can be linked to the 'Project Job'. Once the orders are saved in a project you can view project status by **clicking** on the 'Project Job' title (circled below).

Job No	Status	Client	Job Description	Emp	Order D...	%	Order Amt	Total Cost	Total Profit	Lab Cost	Mat Cost	Est (H)	Used (H)	Quote ...	Desp
1	ACTIVE	ITMS	MISC TEST	1	14/03/18	100.00	4.00	.00	4.00	.00	.00	.00	22.80		
2															
3	Total					%	\$4.00	\$0.00	\$4.00	\$0.00	\$0.00	.00	22.80		

From this summary of cost, you can drill down to the costs of the individual jobs. **Click** on the green 'Refresh' icon to display the 'Show Project (Detail)' window. **Dbi-Click** in the **Part Code** column (circled below) to open the 'Process Sheet' window for this job.

The screenshot displays three overlapping windows from a software application:

- All Project Orders (Production Orders):** A table with columns: Job No, Status, Client, Job Description, Emp, Order D..., %, Order Amt, Total Cost, Total Profit, Lab Cost, Mat Cost, Est (H), Used (H), Quote..., and Desp. The data includes Job No 1189, Status ACTIVE, Client ITMS, Job Description MISC TEST, Emp 1, Order D... 14/03/18, % 100.00, Order Amt 4.00, Total Cost .00, Total Profit 4.00, Lab Cost .00, Mat Cost .00, Est (H) .00, Used (H) 22.80. A green refresh icon is circled in red.
- Show Project (Detail):** A table with columns: Job No, Pos, Part Code, Description, Ord Qty, Desp Qty, Order Amt, Despatch, Invoice, and Invoiced. The data includes Job No 1189, Pos 1, Part Code MISC_TEST, Description MISC TEST, Ord Qty 1, Desp Qty 1, Order Amt \$4.00. The 'Part Code' column is circled in red.
- Process Sheet (Factory Order):** A form with fields for Order No (1189), Job Type (PR), Div (1), and Client Code (ITMS). It includes sections for Job Control (MISC TEST), Production Steps (Despatch, Invoices and History Transfer), Job (Create Job Ticket, Edit Job Ticket, Activate Job, Material List), Print Jobs Option (All Tickets, Cover Sheet, Drawing Files, Default, Type 1, Type 2), and Materials (Pick Materials or Parts, Stock Reservations, Issue Material to Job, Purchase Order). At the bottom, it shows status indicators: NO DESPATCHES, JOB IS ACTIVE - STARTED, and NO PICKING REQUIRED.