Creating a Production Order

To Create a Factory Order

From the OPTO ribbon, select the 'Orders' tab and **click** on the 'New Factory Order' icon to open the 'Factory Order - <New Entry>' window. In the *Client Code* field (1) **press** <**F2**> and select the client from the pop-up list, then **click** <u>OK</u>. **Press** <**TAB**> to generate the *Client Name* (2) and *Contact Name* (3) fields, the *Type* field (4) is usually generated by a parameter setting. Continue to **press** <**TAB**> to move through the fields and enter information where necessary.



If the user wants to view any quote/s that were tendered for the item/s, **click** in the **Part Code** column, type in an abbreviation of the required part code. For example 'ASS' and **press <TAB>** to display a 'Parts' list of all parts beginning with ASS. **Click** on the required part and **click** <u>OK</u>.

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When all required part have been added to the order **press** <**F9**> to save.

NOTE: If there are non-inventory parts in the production order a warning will appear, review the parts or click OK if relevant.

To advance through the production process **click** on the 'Process Sheet (Factory)' icon (circled below) to create job tickets, activate the job, or edit the order.

File	HOME	CONTACTS	RESOURCE	S INVENTORY	QUOTES	PURCHASING	ORDERS	JOBS/SCHEDULING	INVOICING	QUALITY	MANAGEMEN	T WORKSHOP
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Please see 'Process Sheet (Factory)' in this chapter for further instruction.