



Scanco Production Management Plus

What's New Guide

Scanco Production Management Plus Version 7.0011 & 7.0012

Scanco Multi-Bin Version 7.0011 & 7.0021

Sage 100 Version 7.00.1.0 and 7.00.2.0

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Chapter 1

Introduction

This document describes the enhancements included in Scanco Production Management Plus 2021.1 and 2021.2 versions 7.00.1.0.0 and 7.00.2.0.0.

Registration

Scanco Production Management Plus enhancements must be registered and activated from Library Master Setup menu > Scanco Product Registration. Refer to the Scanco Production Management Plus Installation guide for information on registering Scanco Production Management Plus.

Compatible Versions

Scanco Production Management Plus is compatible with Sage 100 2021 version 7.00 with Product Update 1 or 2.

Required Modules

The following modules must be installed, activated, and set up to utilize Scanco Production Management Plus enhancements.

- Library Master
- Common Information
- General Ledger
- Inventory Management
- Accounts Receivable
- Sales Order
- Production Management

Scanco Multi-Bin Integration

Scanco Production Management Plus may be utilized with and without Scanco Multi-Bin. Scanco Production Management Plus does not integrate with any non-Scanco products.

Refer to the Scanco Multi-Bin for Production Management Installation guide for information on Scanco Multi-Bin for Production Management. Scanco Multi-Bin for Production Management Enhancements must be installed after installing Sage Production Management and Scanco Multi-Bin to utilized Scanco Multi-Bin for Production Management features.

Non-Scanco Third Party Products

Scanco Production Management Plus is not compatible with non-Scanco third party products. If third-party products that integrate with your Sage product are used, please contact your Scanco sales account manager for assistance. If other Sage products are integrated, check with your business partner or Sage to ensure that these components are compatible.

Scanco Enhancements

Scanco Manufacturing Efficiency, Scanco In Transit, Scanco Scheduled Bill of Materials, Scanco Property Management 2000 and Scanco Advanced Landed Cost must be uninstalled and a new registration file

that does not contain Scanco Manufacturing Efficiency, Scanco In Transit, Scanco Scheduled Bill of Materials and/or Scanco Advanced Landed Cost must be obtained and activated before installing Sage Production Management and Scanco Production Management Plus. Refer to page **Error! Bookmark not defined.**

Sage Operations Management

Scanco Production Management Plus may not be installed when Sage Operations Management exists in Sage 100.

Sage Production Management and Sage Operations Management are two different Sage 100 modules. Access the Sage Operations Management/JobOps portal at portal.jobops.com to download Sage Operations Management, Scanco Multi-Bin for Sage Operations Management, and Mobility for Sage Operations Management product installs, documentation, and hot fixes. Access jobops.com for information on the Sage Operations Management product line, training classes, or to schedule a demo of Sage Operations Management.

Access the Sage Production Management downloads page at <https://scanco.com/scanco-downloads> to download Sage Production Management, Scanco Multi-Bin for Sage Production Management, Mobility for Sage Production Management, and Scanco Production Management Plus product installers, documentation, and hot fixes.


Supporting Documentation

Review the Scanco Production Management Plus Installation Guide prior to installing Scanco Production Management Plus. This important Scanco Production Management Plus document is available from the Scanco Production Management Plus downloads page at <https://scanco.com/scanco-production-management-plus-downloads>.

Refer to the Sage 100 Installation and System Administrator's Guide for information on installing Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium and Sage 100 2021 Product Update 1 or 2.

Refer to the Scanco Multi-Bin Installation Guide for information on installing or upgrading Scanco Multi-Bin <https://scanco.com/scanco-downloads/>.

Refer to the Scanco Multi-Bin for Sage Production Management Installation Guide for information on installing or upgrading Sage 100 with Sage Production Management and Scanco Multi-Bin. Scanco Multi-Bin for Sage Production Management may be downloaded from <https://scanco.com/prod-mgmt-downloads/>.

 **Note:** Please contact your authorized Sage Production Management partner or the Sage Support department at 866-996-7243 or <https://customers.sagenorthamerica.com> for assistance with Sage Production Management. Submit a Scanco Support request at <https://scancohelp.zendesk.com/hc/en-us/requests/new> for assistance with Scanco Multi-Bin and Scanco Production Management Plus.

Chapter 2

Library Master

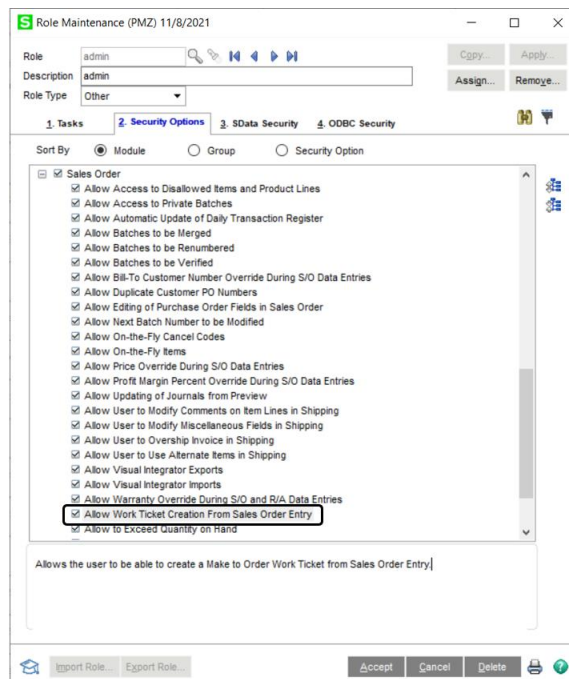
This chapter describes the enhancements added to the Sage 100 Library Master module for Scanco Production Management Plus.

Role Maintenance

The following enhancement is available from the Role Maintenance Security Options tab.

Allow Work Ticket Creation From Sales Order Entry

After installing Scanco Production Management Plus, the option *Allow Work Ticket Creation From Sale Order Entry* is available from the Sales Order Security Options menu. When this check box is selected, the users assigned to the selected role may create work tickets from the Sale Order Entry Lines tab.



When the Allow Work Ticket Creation From Sale Order Entry check box is not selected, a work ticket may not be created manually or automatically. With this setting, the work ticket creation button, found on the Sales Order Entry Lines tab, is disabled.

How To Define Security for Work Ticket Creation from Sales Order Entry

1. Access Library Master Security Menu > Role Maintenance.
2. Select or create a Role.
3. When creating a new role, type a Description and assign a Role Type.
4. Select the Security Options tab.
5. Expand the Sales Order folder.
6. Select or clear the Allow Work Ticket Creation From Sale Order Entry check box.
7. Select Accept to save the security option setting.

Chapter 3

Inventory Management

This chapter describes the enhancements added to the Sage 100 Inventory Management module for Scanco Production Management Plus.

Inventory Maintenance

The following enhancement is available from the Item Maintenance Main tab.

Main Tab

After installing Production Management Plus, the Make to Order option displays in the Procurement drop down list.

The screenshot shows the 'Item Maintenance (PM1)' window for item 'BOARD-04230' (Description: MOTHERBOARD). The 'Procurement' dropdown menu is open, showing options: 'Make to Order' (highlighted), 'Make to Stock', 'Buy to Stock', 'Buy to Order', and 'Subcontract'. The 'Make to Order' option is selected. The window also displays various fields for pricing, costs, and quantities.

Whse	Description	On Hand	On PO	On SO	On Bk Ord	Committed	On W/T	Req for W/T	A
000	MAIN WAR...	6.00	25.00	7.00	.00	7.00	.00	.00	

When the Restrict to Make to Order Procurement Types check box field is selected in Sales Order Options, work tickets can only be created for items with Make to Order assigned to the Procurement field in Item Maintenance.

Product Line Maintenance

The following enhancement is available from the Production Line Maintenance Main tab.

Main Tab

After installing Production Management Plus, the Make to Order option displays in the Procurement drop down list.

Product Line Maintenance (PMZ) 12/21/2021

Product Line: CARD
Description: COMPUTER CARDS

1. Main 2. Accounts

Product Type: Raw Material
Valuation: FIFO
Procurement: Make to Order
Inventory Cycle: Buy to Stock
Allow Back Orders: Buy to Order
Allow Trade Discount: Subcontract
Inactive Item: ☐
Explode Kit Items: Prompt

Commission Method: Standard
Commission Rate: 0.000%
Base Commission: .00

Confirm Cost Increase in Receipt of Goods: ☐

Unit of Measure
Standard: EACH
Purchases: EACH
Sales: EACH
No. of EACH: 1
No. of EACH: 1

Sales Tax Class: NT
Purchases Tax Class: NT
Nontaxable
Nontaxable

Print Receipt Labels: By Item
Commodity Code: STD
Price Code: STANDARD PRICING

Accept Cancel Delete

When Make to Order is assigned to the Procurement field and the product line is assigned to an item record in Item Maintenance, Make to Order defaults to the Procurement field in Item Maintenance.

Chapter 4

Sales Order

This chapter describes the enhancements added to the Sage 100 Sales Order module for Scanco Production Management Plus.

Sales Order Options

The following enhancements are available in Sale Order Options.

Make To Order Tab

A Make to Order tab is available from Sales Order Options after Scanco Production Management Plus is installed and activated. The Make to Order tab is enabled after the Production Management module is activated and set up in the current company.

Fields

Restrict to Make to Order Procurement Types

Select the check box to prevent the creation of a work ticket from Sales Order Entry for an item code when Make to Stock, Buy to Stock, Buy to Order, or Subcontract is assigned to the Procurement field in Item Maintenance. When the check box is selected, a work ticket may only be created for an item code when Make to Order is assigned to the Procurement field in Item Maintenance.

Clear the check box to allow the creation of a work ticket for an item code when Make to Stock, Make to Order, Buy to Stock, Buy to Order, or Subcontract is assigned to the Procurement field in Item Maintenance.

Make to Order Creation Method

Select an option to determine how work tickets are created from a sales order.

- Select Automatic to create a work ticket automatically after focus moves from a record on the Sales Order Entry Lines tab.
- Select Disabled to disable all other fields on the Make to Order tab and to prevent the creation of work tickets from sales order items. All users are prevented from creating a work ticket from the Sales Order Entry Lines tab regardless of the Role Maintenance Security Options setting.
- Select Manual to create a work ticket by selecting the Work Ticket button from the Sales Order Entry Lines tab.
- Select Prompt to create a work ticket by selecting Yes from the message Do you want to create a Work Ticket for this item? after focus moves from a record on the Sales Order Entry Lines tab.

Default Work Ticket Class

Select the work ticket class that is used to create a work ticket from a sales order item. A work ticket class must be assigned to this field to create work tickets from a sales order item.

When a value that is not a valid work ticket class in Work Ticket Class Maintenance is assigned to this field, the message *### is not on file.* displays. When a valid work ticket class is not assigned to the Default Work Ticket Class field, the message *Invalid default Work Ticket Class in Sales Order Options.* displays when a user attempts to generate a work ticket from a sales order item.

When a work ticket is created by copying a template and the template is assigned a default work ticket class, the template's default work ticket class is used to create the work ticket. When a template is not assigned to a work ticket template or a work ticket is created manually or for a Bill Number, the work ticket class assigned to the Default Work Ticket Class field is used.

Default Work Ticket Status

Select an option to define the work ticket status when a work ticket is created from a sales order item.

- Select Open to assign Open to the Status field in the work ticket.
- Select Estimate to assign Estimate to the Status field in the work ticket.
- Select Released to assign Released to the Status field in the work ticket. The auto issue of materials and/or labor and printing work tickets and/or picking sheet occur when the work ticket created from the sales order item is assigned the Released status. Parameter settings in Work Ticket Class Maintenance and Production Management Options determine the processes that occur when a work ticket is released.
- Select Match Order Type to base the work ticket status on the value assigned to the Order Type field in Sales Order Entry.

Sales Order Type	Work Ticket Status
Standard Order	Open
Back Order	Open
Master Order	Work ticket creation not available
Repeating Order	Work ticket creation not available
Quote	Estimate
Quote Promoted to Standard Order	Change to Open

Open Work Ticket After Creation

Select the check box field to display Work Ticket Entry after a work ticket is created from a sales order item. Clear the check box field to not display Work Ticket Entry after a work ticket is created from a sales order item.

Work Ticket Printing Default Report Setting

Enter a Work Ticket Printing report setting established Work Ticket Printing. Click the Lookup button to list all Work Ticket Printing report settings for the current company. This field is available when a default report setting is available in SY_ReportSetting.M4T for the current company. Access Production Management Main menu > Work Ticket Printing to define a report setting.

When the Print Work Ticket Upon Release check box is selected in Production Management Options and a work ticket is created from a sales order item, a work ticket prints based on the report setting assign to the Work Ticket Printing Default Report Setting field. Create a work ticket form specific for make to work tickets and assign the work ticket setting to the Work Ticket Printing Default Report Setting field.

 **Note** Work Ticket Printing from the Work Ticket Main menu or using quick printing from Work Ticket Entry does not review the Sales Order Options Work Ticket Printing Default Report Setting field.

Copy From

Select an option to determine how information is assigned when creating a work ticket from a sales order.

- Select Manual to establish work ticket information using only the Work Ticket Class specified in the Sales Order Options Default Work Ticket class field and the Default Activity Code and Work Center assigned to the work ticket class. Only work ticket step numbered 000000 is established when creating a work ticket from a sales order item using the Manual Copy From option.

- Select Template to establish work ticket information using a work ticket template number. The current template revision is used. To determine which template number to use, the template number assigned to the item code record in Item Maintenance is first reviewed and used if it exists. When a template number is not assigned to the item code record in Item Maintenance, the item code assigned to the Item Code field in the active record on the Sales Order Entry Lines tab is compared to all work ticket template numbers. When the item code and the work ticket template number match, the matching template number is used to establish the work ticket. When the item code and the work ticket template number do not match, the manual copy from option is used to create the work ticket.
- Select Bill of Materials to establish work ticket information using a Bill of Materials bill number. The current revision for the selected bill number is used. All bill number options selected from the Option Selection window in Sales Order Entry are also used to establish the work ticket. The value assigned to the Item Code field on the Sales Order Entry Lines tab must be a valid bill number in Bill of Materials Maintenance. When the selected item code is not a bill number, the manual copy from option is used to create the work ticket. This option is only available when the Bill of Materials module is installed, activated, and integrated with Production Management.

Prompt for Effective Date/Explode Subassemblies

Select the check box field to display the Bill of Materials Info dialog box when a work ticket is created using the Bill of Materials Copy From method. Clear the check box field to define the default effective date and explode subassemblies setting from Sales Order Options. This check box field is enabled only when Bill of Materials is selected in the Copy From field and the Prompt for Effective Date/Explode Subassemblies check box field is not selected.

Effective Date

Select Order Date in this field to use the sales order date as the effective date when creating a work ticket from a sales order item by copying a bill number. Select Current Date in this field to use the Sales Order module date as the effective date. This field is enabled only when Bill of Materials is selected in the Copy From field and the Prompt for Effective Date/Explode Subassemblies check box field is not selected.

Explode Subassemblies

Select the check box field to explode subassemblies when creating a work ticket from a sales order item by copying a bill number. Clear the check box to not explode subassemblies when creating a work ticket from a sales order item by copying a bill number. This check box field is enabled only when Bill of Materials is selected in the Copy From field and the Prompt for Effective Date/Explode Subassemblies check box field is not selected.

Sales Order Entry

The following enhancements are available from the Sale Order Entry Lines tab.

Lines Tab

The following fields and button are available on the Sales Order Entry Lines tab when Scanco Production Management Plus is installed and activated.

Field

Work Ticket No

After a work ticket is created for the selected sales order item, review the work ticket number from the Work Ticket No field. This field is disabled.

Vendor No

After a work ticket is created for the selected sales order item, the Vendor No field is disabled. A work ticket cannot be created from a sales order item that is associated to a purchase order.

PO Number

After a work ticket is created for the selected sales order item, the PO Number field is disabled. A work ticket cannot be created from a sales order item that is associated to a purchase order.

PO Req Date

After a work ticket is created for the selected sales order item, the PO Req Date field is disabled. A work ticket cannot be created from a sales order item that is associated to a purchase order.

Button

Work Ticket

Click the Work Ticket button or Alt-W to create a work ticket for the selected sales order item. This button is enabled when the Allow Work Ticket Creation From Sales Order Entry security option is selected in Role Maintenance for the user's role and Automatic, Manual, or Prompt are selected in the Make to Order Creation Method field in Sales Order option, select this

This button is hidden when


1. The Allow Work Ticket Creation From Sales Order Entry security option is not selected in Role Maintenance for the user's role or
2. The Allow Work Ticket Creation From Sales Order Entry security option is selected in Role Maintenance for the user's role and Disabled is selected in the Make to Order Creation Method field in Sales Order Options.

The Work Ticket button is disabled when a purchase order number is assigned to the PO Number field. A work ticket cannot be created from a sales order item that is associated to a purchase order.

How to Create a Work Ticket from a Sales Order Using the Automatic Method

The Allow Work Ticket Creation From Sales Order Entry security option must be selected in Role Maintenance for the user's role and Automatic must be selected in the Make to Order Creation Method field in Sales Order Options.


3. Create a new sales order or access an existing sales order in Sales Order Entry.
4. Assign information to the Header and Address tabs.
5. Select the Lines tab.
6. Select an item code.
7. Enter a value greater than zero in the Ordered field.

 **Note:** The Back Order field must be zero to create a work ticket from a sales order item.

8. Enter additional information to the sales order item line, if necessary.
9. When Automatic is assigned to the Make to Order Creation Method field in Sales Order Options, move to the next line.
10. Select OK from the message Work Ticket ##### created.
11. Review the value assigned to the Work Ticket No field.
12. The created work ticket may be reviewed and/or edited from Production Management Main menu > Work Ticket Entry or Production Management Inquiries menu > Work Ticket Inquiry.


How to Create a Work Ticket from a Sales Order Using the Manual Method

The Allow Work Ticket Creation From Sales Order Entry security option must be selected in Role Maintenance for the user's role and Manual must be selected in the Make to Order Creation Method field in Sales Order Options.

1. Create a new sales order or access an existing sales order in Sales Order Entry.
2. Assign information to the Header and Address tabs.
3. Select the Lines tab.
4. Select an item code.
5. Enter a value greater than zero in the Ordered field.
-  **Note:** The Back Order field must be zero to create a work ticket from a sales order item.
6. Enter additional information to the sales order item line, if necessary.
7. When Manual is assigned to the Make to Order Creation Method field in Sales Order Options, select the Work Ticket button or Alt-W.
8. Select OK from the message Work Ticket ##### created.
9. Review the value assigned to the Work Ticket No field.
10. The created work ticket may be reviewed and/or edited from Production Management Main menu > Work Ticket Entry or Production Management Inquiries menu > Work Ticket Inquiry.

How to Create a Work Ticket from a Sales Order Using the Prompt Method

The Allow Work Ticket Creation From Sales Order Entry security option must be selected in Role Maintenance for the user's role and Prompt must be selected in the Make to Order Creation Method field in Sales Order Options.

1. Create a new sales order or access an existing sales order in Sales Order Entry.
2. Assign information to the Header and Address tabs.
3. Select the Lines tab.
4. Select an item code.
5. Enter a value greater than zero in the Ordered field.
-  **Note:** The Back Order field must be zero to create a work ticket from a sales order item.
6. Enter additional information to the sales order item line, if necessary.
7. When Prompt is assigned to the Make to Order Creation Method field in Sales Order Options, move to the next line.
8. Select Yes in the message Do you want to create a Work Ticket for this item?
9. Select OK in the message Work Ticket ##### created.
10. Review the value assigned to the Work Ticket No field.
11. The created work ticket may be reviewed and/or edited from Production Management Main menu > Work Ticket Entry or Production Management Inquiries menu > Work Ticket Inquiry.

Copy From Manual Option

The following occurs when Manual is assigned to the Copy From field in Sales Order Options and a work ticket is created from a sales order item.

The default work ticket class assigned in Sales Order Options is used to create the work ticket. Values assigned to the work ticket default from the work ticket class. The value assigned to the Status field is assigned based on the value selected in the Default Work Ticket Status field in Sales Order Options. Manual displays in the Copy From Field in the Work Ticket Entry Copy From dialog box.

Work Ticket Entry (PMZ) 12/1/2021

Work Ticket No: 000000095037

Work Ticket Date: 12/1/2021

Status: Open

W/T Class: STK

Make For: Sales Order

Sales Order No: 0000023

Customer No: ABC

Copy From... Dialog:

Work Ticket No: 000000095037

W/T Class: STK

Copy From: Manual

On the Work Ticket Entry Header tab, Sales Order is assigned to the Make For field, the sales order number is assigned to the Sales Order No field and the customer number assigned to the sales order is assigned to the Customer No fields.

Work Ticket Entry (PMZ) 12/1/2021

Work Ticket No: 000000095037

Work Ticket Date: 12/1/2021

Status: Open

W/T Class: STK

Item Code/Bill No: BOARD-04230

Description: MOTHERBOARD

Parent Whse: 000 MAIN WAREHOUSE

Materials Whse: 000 MAIN WAREHOUSE

Quantity Ordered: 2.00

Yield Percent: 99.000%

Quantity Planned: 2.02

Quantity Completed: .00

Quantity Scrapped: .00

Unit Of Measure: EACH

Auto Issue Labor: ☒

Backflush Labor: ☐

Print Work Ticket: ☒

Print Pick Sheets: ☒

No. of Labels: 1

Auto Issue Materials: ☒

Backflush Materials: ☐

Planner Code:

Make For: Sales Order

Sales Order No: 0000023

Customer No: ABC

Step 000000 is the only step that is created for the work ticket when the manual copy from method is used to create a work ticket from a sales order item. The activity code and work center default from the work ticket class.

Work Ticket Entry (PMZ) 12/1/2021

Work Ticket No: 000000095037

1. Header 2. Steps 3. Materials 4. Inquiry 5. Schedule 6. Totals

Row: 2

Step No	Description	Activity Code	Work Center	Orig Budget Hours	Rev Budget Hours
1	Pack keyboard & monitor	00001	ACC	0.00	0.00
2				0.00	0.00

Status Code: NEW
 Status Comment: NEW TICKET
 Qty Completed: .00
 Tool Code:
 Change Order: ☐

Print W/T... Print Pick... Accept Cancel Delete

Budget values and materials are not assigned to the work ticket. The work ticket is ready for the user to assign the appropriate information before work begins on the work ticket.

Work Ticket Entry (PMZ) 12/1/2021

Work Ticket No: 000000095037

1. Header 2. Steps 3. Materials 4. Inquiry 5. Schedule 6. Totals

Row: 1

Item Code	Step No	Required	Issued	Comment
		.00	.00	

Description:
 Warehouse:
 Unit Of Measure:
 Cost: .000
 Promise Date:

Step Filter: <All>

Print W/T... Print Pick... Accept Cancel Delete

Copy From Template Option

The following occurs when Template is assigned to the Copy From field in Sales Order Options and a work ticket is created from a sales order item.

Template Number Selection

The template number assigned to the item code record in Item Maintenance is used to create the work ticket.

Sales Order Entry (PMZ) 12/1/2021

Order Number: 0000024

1. Header 2. Address 3. Lines 4. Totals 5. Payment

Quick Row: 1

Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1 BOARD-04230	1.00	00	893.30	893.30	

Item Maintenance (PMZ) 12/1/2021

Item Code: BOARD-04230
Description: MOTHERBOARD

1. Main 2. Additional 3. Quantity 4. History 5. Transactions 6. Orders 7. Cost Detail

Confirm Cost Increase in Receipt of Goods: ☐
Print Receipt Labels: Yes
Explode Kit Items: Prompt
Next Lot/Serial Number:

Commission Method: Standard

Template No: MBOARD

Sales Tax Class: NT (Nontaxable)
Purchases Tax Class: NT (Nontaxable)

Vendor Number: MAKE
PO Number:
PO Req Date:
Locations:
Work Ticket No: 000000095038

When a template number is not assigned to the item code record in Item Maintenance, the item code assigned to the Item Code field in the active record on the Sales Order Entry Lines tab is compared to all work ticket template numbers. When the item code and the work ticket template number match, the matching template number is used to establish the work ticket.

Sales Order Entry (PMZ) 12/1/2021

Order Number: 0000025

1. Header 2. Address 3. Lines 4. Totals 5. Payment

Quick Row: 1

Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1 DESKTOP	2.00	00	3,176.18	6,352.36	

Item Maintenance (PMZ) 12/1/2021

Item Code: DESKTOP
Description: DESKTOP COMPUTER SYSTEM

1. Main 2. Additional 3. Quantity 4. History 5. Transactions 6. Orders 7. Cost Detail

Confirm Cost Increase in Receipt of Goods: ☐
Print Receipt Labels: Yes
Explode Kit Items: Prompt
Next Lot/Serial Number:

Commission Method: Standard

Template No: DESKTOP

Sales Tax Class: NT (Nontaxable)
Purchases Tax Class: NT (Nontaxable)

Vendor Number: MAKE
PO Number:
PO Req Date:
Locations:
Work Ticket No: 000000095039

Current Revision: ☒ STK
Make To:

Activity Code: 00001
Work Center: CAB
Tool Code:

Initial Status Code:
Production Start Date: System Date Plus
Production Due Date: Prod Start Date Plus

Categories: DESKTOP
CATALOGUE REF#:
CATALOGUE RAC#:
ALTERNATE ITEM:
ENTERED BY: COMMERCIAL

Inactive Item: ☐
Allow Back Orders: ☐
Allow Trade Discount: ☐
Allocate Landed Cost: ☒

Last Physical Count:

Accept Cancel Delete

When a template number is not assigned to the item in Item Maintenance and the item code does not match to a work ticket template, the manual copy from option is used to create the work ticket.

Work Ticket Information

The work ticket class assigned to the work ticket template is used when a work ticket is created from a sales order using the copy from template method. When a work ticket class is not assigned to the work ticket template, the default work ticket class assigned in Sales Order Options is used to create the work ticket. Values assigned to the work ticket default from the work ticket template, if available.

Work Ticket Entry (PMZ) 12/1/2021

Work Ticket No: 000000095038

Work Ticket Date: 12/1/2021

Status: Open

W/T Class: STK

Copy From: Template

Template No: MBOARD

Revision No: 000

Make For: Sales Order

Sales Order No: 0000024

Customer No: ABC

The Status field value is assigned based on the value selected in the Default Work Ticket Status field in Sales Order Options. Template, the template number, and template revision number display in the Work Ticket Entry Copy From dialog box. The current revision number for the selected work ticket template is always used to create the work ticket.

On the Work Ticket Entry Header tab, Sales Order is assigned to the Make For field, the sales order number is assigned to the Sales Order No field and the customer number assigned to the sales order is assigned to the Customer No fields. The activity code and work center values default from the work ticket class.

Work Ticket Entry (PMZ) 12/1/2021

Work Ticket No: 000000095038

Work Ticket Date: 12/1/2021

Status: Open

W/T Class: STK

Item Code/Bill No: BOARD-04230

Description: MOTHERBOARD

Parent Whse: 000 MAIN WAREHOUSE

Materials Whse: 000 MAIN WAREHOUSE

Quantity Ordered: 1.00

Yield Percent: 99.000%

Quantity Planned: 1.01

Quantity Completed: .00

Quantity Scrapped: .00

Unit Of Measure: EACH

Print Work Ticket: ☒

Print Pick Sheets: ☒

No. of Labels: 1

Auto Issue Labor: ☒

Backflush Labor: ☐

Auto Issue Materials: ☒

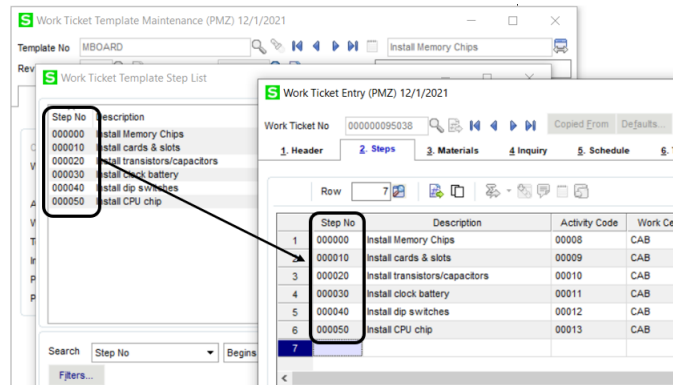
Backflush Materials: ☐

Make For: Sales Order

Sales Order No: 0000024

Customer No: ABC

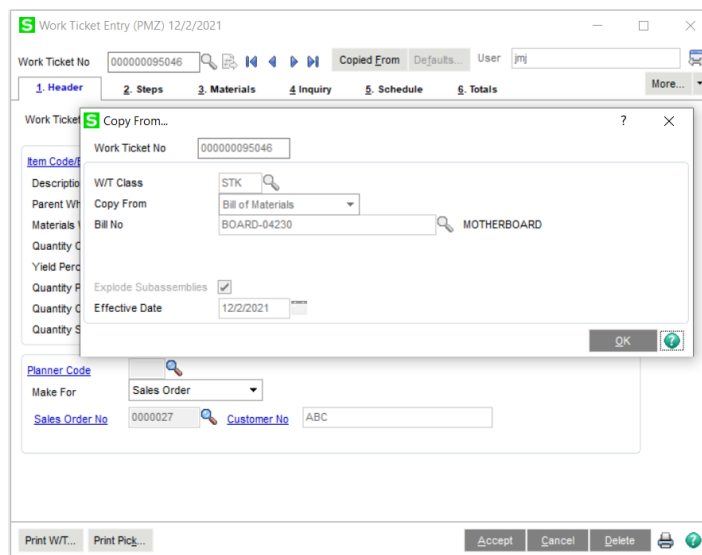
Step records are created based on step records assigned to the work ticket template. Step information, including budget values and materials, is assigned based on information in the work ticket template steps.



Copy From Bill of Materials Option

The following occurs when Bill of Materials is assigned to the Copy From field in Sales Order Options and a work ticket is created from a sales order item.

Information assigned to the bill number in Bill of Materials Maintenance is used to define the work ticket. Bill of Materials, the bill number, the explode subassemblies setting and the effective date display in the Work Ticket Entry Copy from dialog box.



On the Work Ticket Entry Header tab, Sales Order is assigned to the Make For field, the sales order number is assigned to the Sales Order No field and the customer number assigned to the sales order is assigned to the Customer No fields.

Steps are created based on information from the work ticket template number assigned to the bill number. Materials are assigned to the work ticket based on components assigned to the bill number and to the work ticket template number assigned to the bill number. When specified to explode subassemblies, components of subassemblies are assigned to the work ticket.

Bill of Materials Maintenance (PMZ) 12/2/2021

Bill Number: BOARD-04230
Revision: 000
Description 1: MOTHERBOARD
Description 2:
Bill Type: Standard

1. Header 2. Lines

Component	Item Code	Revision	Step No	Quantity/Bill
1	MEMRY-00080	*	000000	2.00
2	SLOTS-04534-AT	*	000010	7.00
3	CARD1-01300	*	000010	1.00
4	SCREW-02554	*	000060	9.00
5	ELECT-00001	*	000060	1.00
6	JASSY	*	000060	1.00

Description: ELECTRONIC PARTS
Find No.:
Scrap Percent: 0.000%
Unit Of Measure: EACH

Work Ticket Entry (PMZ) 12/2/2021

Work Ticket No: 000000095046
1. Header 2. Steps 3. Materials 4. Inquiry 5. Schedule 6. Tot

Item Code	Step No	Required	Issued
1 SLOTS-04534-AT	000010	7.07	.00
2 SCREW-02554	000060	10.42	.00
3 MCHP-00256-80	000000	76.84	.00
4 SWTCH-18174	000060	2.02	.00
5 CAPAC-14549	000060	10.10	.00
6 BTTRY-98422	000060	1.01	.00
7 TRANS-14212	000060	5.05	.00
8 BTTRY-98422	000060	1.01	.00
9 CAPAC-14549	000060	10.10	.00

Description: 1/2" 6-32 FLAT HEAD SCREW
Warehouse: 000

Bill with Options

Work tickets may be created for bill numbers assigned to sales orders. When bill options are assigned to a bill number from the Sales Order Entry Lines tab, the selected bill options are used to define the structure and information in the work ticket. Bill options must be assigned prior to creating a work ticket from a sales order line to be applied to the work ticket.

Sales Order Entry (PMZ) 12/2/2021

Order Number: 0000026
1. Header 2. Address 3. Lines 4. Totals 5. Payment
User: jmj

Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1 DSKTP-00100	1.00	.00	3,176.18	3,176.18	
2					

Vendor Number: MAKE
PO Number:
PO Req Date:
Locations:
Work Ticket No:
Print Order... Print

Option Selection

Bill Number: DSKTP-00100
Revision: 000
DESKTOP COMPUTER SYSTEM

	Option Category	Required	Option	Option Description
1	MAIN DISK DRIVE ASSEMBLY	<input checked="" type="checkbox"/>	01	5 1/4 INCH DISK DRIVE ASSEMBLY
2	AUXILIARY DISK DRIVE ASSEMBLY	<input type="checkbox"/>	01	5 1/4 INCH DISK DRIVE ASSEMBLY
3	SECOND AUXILIARY DISK DRIVE	<input type="checkbox"/>	02	3 1/2 INCH DISK DRIVE ASSEMBLY
4	HIGH SPEED CPU	<input type="checkbox"/>	02	25 MHZ CPU
5	MEMORY PACKAGE	<input type="checkbox"/>	01	6 MEG MEMORY PACKAGE
6	COLOR DISPLAY PACKAGE	<input type="checkbox"/>	01	VGA COLOR DISPLAY

OK Cancel

After the work ticket is created for the sales order item, the effective date and option codes display on the Work Ticket Entry Header tab and in the Copy From dialog box. When the Prompt for Effective Date/Explode Subassemblies check box field is not selected in Sales Order Options, the effective date is defined by the Effective Date field in Sales Order Options.

When the Prompt for Effective Date/Explode Subassemblies check box field is selected in Sales Order Options, the effective date and the option to explode subassemblies are specified in the Bill of Materials Info dialog box.

Bill of Materials Info Dialog Box

The Bill of Materials Info dialog box displays from the a Sales Order line when the work ticket creation process is initiated from a bill number and the Prompt for Effective Date/Explode Subassemblies check box field is selected in Sales Order Options.

When using the Prompt creation method, the Bill of Materials Info dialog box displays after selecting Yes in the message Do you want to create a Work Ticket for this item?. When using the Automatic creation method the Bill of Materials Info dialog box displays after moving focus from the current record. When using the Manual creation method, the Bill of Materials Info dialog box displays after selecting the Work Ticket button or Alt-W hot key.

Enter an effective date, specify the explode subassemblies setting and select OK to create the work ticket for the bill number.

Fields

Effective Date

Enter an effective date, or click the Calendar button to select a date from the calendar. A date must be entered in this field to continue with the work ticket creation process. When an effective date is not entered in this field the message Invalid Effective Date. displays.

Explode Subassemblies

Select the check box field to explode components from subassemblies that are assigned to the bill number in the selected Sales Order Entry line.

Buttons

OK

Select the OK button to continue the work ticket creation process for the selected sales order item.

Cancel

Select the Cancel button to cancel the work ticket creation process for the selected sales order item and return to the Sales Order Entry Lines tab.

Messages

The following messages may display when parameter settings are correctly specified in Sales Order Options or in Work Ticket Class Maintenance.

When a work ticket class is not selected in the Default Work Ticket Class field in Sales Order Options and the work ticket creation process is initiated, the following message displays.

Invalid default Work Ticket Class in Sales Order Options.

Follow these steps to correct this situation.

1. Select OK in the message.
2. Save or cancel the changes made to the sales order.
3. Close Sales Order Entry.
4. Access Sales Order Setup menu > Sales Order Options.
5. Select the Make To Order tab.
6. Enter a work ticket class in the Default Work Ticket Class field.
7. Select the Accept button.
8. Access the sales order or create a new sales order in Sales Order Entry.
9. Access the existing sales order item or assign an item code and quantity ordered.
10. Initiate the work ticket creation process.

When a default activity code and work center are not assigned to the work ticket class selected in the Default Work Ticket Class field in Sales Order Options and the work ticket creation process is initiated from a sales order item, the following message displays.

Invalid default Activity Code / default Work Center in Work Ticket Class.

Follow these steps to correct this situation.

1. Select OK in the message.
2. Access Production Management Setup menu > Work Ticket Class Maintenance.
3. Assign a value to the Default Activity Code field found on the Main tab.
4. Assign a value to the Default Work Center field found on the Main tab.
5. Select Accept.
6. Access the sales order item.
7. Initiate the work ticket creation process.

After a work ticket is created from a sales order item, the following message displays.

Work Ticket ##### created.

Select OK to continue modifying the sales order.

Sales Order Printing

The following enhancement is available in Sale Order Printing.

SO_SalesOrderWrk.M4T Table

The field PM140_WorkTicketNo is available in the SO_SalesOrderWrk.M4T table. This allows the work ticket number associated with a sales order item to be printed on a sales order. Use Crystal Reports to add the work ticket to the appropriate sales order form. The following is an example of displaying the work ticket number on a sales order form.

Production Management Company
7158 Grand Ave

0000027
12/2/2021

American Business Computers
2131 E. 14th Street
Suite 1000
Milwaukee, WI 54567-9023

American Business Computers
2131 E. 14th Street
Suite 1000
Milwaukee, WI 54567-9023

Artie Johnson

UPS BLUE

Net 30 Days

BOARD-04230	EACH	1.00	0.00	0.00	893.30	893.30
MOTHERBOARD						
Item with Work Ticket						
Work Ticket No: 000000095046						

The work ticket number may also be printed on a sales order form for sales orders that have been completed and are in history.

Invoice Data Entry

The following enhancement is available in Sales Order Invoice Data Entry.

Lines Tab

A Work Ticket No field is available in the second grid on the Lines tab. This field displays the work ticket number associated with the selected sales order item when a work ticket was created from a sales order item line in Sales Order Entry. The work ticket number may not be modified from this field.

S/O Invoice Data Entry (PMZ) 12/10/2021

Invoice No: 0000030

Defaults Customer... Credit...

1 Header 2 Address 3 Lines 4 Totals 5 Payment

Quick Row

Item Code	Ordered	Shipped	Unit Price	Extension	Comment
BOARD-04230	1.00	1.00	893.30	893.30	Item with Work Ticket
2	.00	.00	.00	.00	

Revision: 000

Vendor Number: MAKE

PO Number:

PO Seq Date:

Work Ticket No: 000000095046

Total Amount: 893.30

Quick Print...

Accept Cancel

When a work ticket is associated with a sales order number from Work Ticket Entry, the work ticket number does not display in Sales Order Entry, Sales Order Invoice Data Entry, Sales Order Shipping Data Entry, Invoice Printing, Sales Order and Quote History Inquiry, or Invoice History Inquiry.

Shipping Data Entry

The following enhancement is available in Sales Order Shipping Data Entry.

Lines Tab

A Work Ticket No field is available in the second grid on the Lines tab. This field displays the work ticket number associated with the selected sales order item when a work ticket was created from a sales order item line in Sales Order Entry. The work ticket number may not be modified from this field.

Shipping ID

Ship Date

Ship Status

Shipping No.

Customer No.

SO Created By

American Business Computers

1. Lines

2. Shipping

Item Code

Quick Row

Item Code	Ordered	Shipped	Back Ordered	Comment	Cases
1 BOARD-04230	1.00	.00	.00		0

Extended Desc
☐

Component
☐

Bin Location

Work Ticket No

Quick Print...

Auto Increment
☐

Accept

Cancel

Print

Invoice Printing

The following enhancement is available in Sales Order Invoice Printing.

SO_InvoiceWrk.M4T Table

The field PM140_WorkTicketNo is available in the SO_InvoiceWrk.M4T table. This allows the work ticket number associated with a sales order item to be printed on an invoice. Use Crystal Reports to add the work ticket number to the appropriate sales order form. The following is an example of displaying the work ticket number on a sales order invoice.

Production Management Company 7158 Grand Ave	0000033-IN 12/10/2021												
	0000027 12/2/2021 0002 ABC												
American Business Computers 2131 E. 14th Street Suite 1000 Milwaukee, WI 54567-9023	American Business Computers 2131 E. 14th Street Suite 1000 Milwaukee, WI 54567-9023												
Arlie Johnson													
UPS BLUE	Net 30 Days												
BOARD-04230 MOTHERBOARD Item with Work Ticket Work Ticket Number: 000000095046	<table border="0"> <tr> <td>EACH</td> <td>1.00</td> <td>1.00</td> <td>0.00</td> <td>893.30</td> <td>893.30</td> </tr> <tr> <td></td> <td>White: 000</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	EACH	1.00	1.00	0.00	893.30	893.30		White: 000				
EACH	1.00	1.00	0.00	893.30	893.30								
	White: 000												

Net Invoice:	893.30
Less Discount:	0.00
Freight:	0.00
Sales Tax:	0.00
Invoice Total:	893.30
Less Deposit:	0.00
	893.30

The work ticket number may also be printed on a sales order form for sales orders that have been completed and are in history.

Daily Sales Report/Update

The following enhancement is available from the Daily Sales Report/Update.

Work Ticket Number

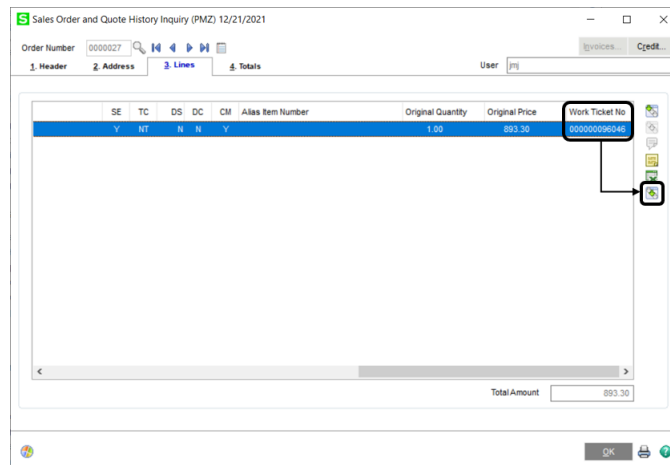
The Daily Sales Report/Update passes the work ticket number in SO_InvoiceDetail.PM140_WorkTicketNo to AR_InvoiceHistoryDetail PM140_WorkTicketNo when a Sales Order invoice containing an item associated with a work ticket number is updated.

Sales Order and Quote History Inquiry

The following enhancements are available from the Sales Order and Quote History Inquiry Lines tab.

Lines Tab

A Work Ticket No field is available on the Lines tab. This field displays the work ticket number associated with the selected sales order item when a work ticket was created from a sales order item line in Sales Order Entry.



Select an item record and then click the Work Ticket zoom button to access the associated work ticket number in Work Ticket Inquiry. This button is enabled only when a work ticket number is assigned to the Work Ticket No field.

Chapter 5

Accounts Receivable

This chapter describes the enhancements added to the Sage 100 Accounts Receivable module for Scanco Production Management Plus.

Accounts Receivable Invoice History Inquiry

The following enhancements are available from the Accounts Receivable Invoice History Inquiry Lines tab.

Lines Tab

A Work Ticket No field is available on the Lines tab. This field displays the work ticket number associated with the selected sales order item when a work ticket was created from a sales order item line in Sales Order Entry.

A/R Invoice History Inquiry (PMZ) 12/21/2021

Invoice No. 0000036 Type INV Date 12/21/2021
Source S/O Order No. 0000027

1. Main 2. Lines 3. Payments

Line No.	Item Code	Item Descri...	Shipped	Unit Price	Extension	Unit Cost	Com.	Work Ticket No
1	BOARD-04230	MOTHERBO...	1.00	893.30	893.30	295.550		000000096046

OK

Select an item record and then the Work Ticket zoom button to access the associated work ticket number in Work Ticket Inquiry. This button is enabled only when a work ticket number is assigned to the Work Ticket No field.

Chapter 6

Purchase Order

This chapter describes the enhancements added to the Sage 100 Purchase Order module for Scanco Production Management Plus.

Auto Generate from Sales Orders

The following enhancement is available in Auto Generate from Sales Order.

Restrict Creation of Purchase Order

When a work ticket is created from a sales order item and a work ticket number exists in the Work Ticket No field in Sales Order Entry, a purchase order may not be generated for the sales order from the Auto Generate from Sales Order process.