

User Manual

Aptean Food and Beverage ERP

Simple Factory Wizard

Product Documentation



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Release notes

Article • 2/27/2026 • 1 min read

To view what's new or changed in each release of the Aptean Simple Factory Wizard extension, select the specific release version.

| Date | Release version | Description |
|---------------|----------------------------|-------------------|
| February 2026 | 2401.3.0.0 | Platform release |
| February 2026 | 2401.2.0.0 | Stability release |
| July 2025 | 2401.1.0.0 | Stability release |
| June 2024 | 2401.0.0.0 | Initial release |



2401.3.0.0

Release Note • 2/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Simple Factory Wizard extension, the following changes have been made to ensure compatibility with Business Central, version 28.

- The *ItemAvailFormsMgt* codeunit has been replaced with the *Prod. Order Availability Mgt.* codeunit for item availability display in the *ProdOrderComponents142FDW* page.
- The item availability type methods (*ByEvent()*, *ByPeriod()*, *ByVariant()*, *ByLocation()*, *ByBOM()*) have been replaced with the *Item Availability Type* enum values.
- The *SetProdOrderComponent* method for order tracking has been replaced with the *SetVariantRec* method in the *Order Tracking* page.

Note

These changes affect the production order component availability views and order tracking functionality.



2401.2.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

| ID | Description |
|--------|--|
| 326677 | The system fails to update line-level records when the Refresh Production Order action is executed on the Firm Planned Production Order or Planned Production Order page created with the same production order number as a posted and released production order. |
| 302012 | An error occurs on the Sales Order Planning page when creating a released production order. This issue arises as the system incorrectly clears the value in the Location Code field of the created production order. |



2401.1.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Simple Factory Wizard extension, the translation file for the Chinese (zh-CN) language has been added.



2401.0.0.0

Release Note • 6/12/2024 • 2 min read

With the features added in this release of the Aptean Simple Factory Wizard extension, you can:

- Set up item usage types, labor types, and production priority groups. For more information, see [Setup](#).
- Generate a production plan based on an item's demand. For more information, see [Generate a production plan](#).
- Manage suggested demand lines generated by the system based on logical calculations. For more information, see [Manage suggested demand lines](#).
- Review and edit the production plan and create multiple production orders. For more information, see [Use the simple planning worksheet](#).
- Set up a factory, production processes, and process rate lines. For more information, see [Set up a factory](#) and [Set up production processes and process rates](#).
- View the factory setup details and add factory production and process rate lines. For more information, see [Maintain the simple factory setup](#).
- Set a default simple factory plan for an item and view the factory details in production orders. For more information, see [Set a default simple factory plan for an item](#) and [View simple factory details in production orders](#).
- Run the simple factory scheduler with the filter criteria you define and view multiple production orders in factories that match the filter. For more information, see [Run the simple factory scheduler](#) and [View the simple factory schedule](#).
- View the details of the production orders, manage the production sequence, change a production order to a different production line, and split a production order for better planning. For more information, see [Manage the simple production line schedule](#) and [Split the production order](#).



Introduction

Article • 6/12/2024 • 1 min read

The Aptean Simple Factory Wizard (SFW) extension simplifies the planning and production process. You can make planning decisions based on recent sales orders and demand forecasts, create multiple production orders, set up factories to combine production and process lines, define required resources, and view the factory schedule with minimal setup and navigation.

Efficient planning and production are important in any industry but they are especially important in the fresh food industry due to the short shelf life of fresh produce. The process can be complex, involving planning decisions, implementation, and navigation between many screens to track all activities. The Aptean Simple Factory Wizard extension provides a simple and comprehensive solution, with which you can make informed planning decisions, view and streamline all levels of the production process, and ensure deliveries are met.

! Note

The current version of this extension does not support the following:

! Note

All the features and rules of the Aptean [Fresh Bridge](#) extension apply to this extension.



Setup

Article • 6/12/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up item usage types](#)
- [Set up labor types](#)
- [Set up production priority groups](#)



Manage permission sets

Article • 8/2/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *SIMPFACTWIZARD142FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *SIMPFTWIZBASIC142FDW*.


User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see

[Assign permissions to users and groups](#).

Assign a permission set



1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.



3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

The associated fields are automatically updated based on the entered value.

The user has the necessary permissions to use the features of the Apteau Simple Factory Wizard extension, ensuring secure and role-based access.



Set up item usage types

Article • 6/12/2024 • 2 min read

You can specify an item's intended use. These item usage types can be used to filter the items when the system calculates a production plan. For more information, see [Generate a production plan](#).

The following procedure outlines how to set up an item usage type.



1. Select the Search icon , enter **Items**, and then choose the related link.

The **Items** list page opens.

2. Select the required item.

The **Item Card** page opens.

3. On the **Planning** FastTab, in the **Item Usage Type** field, select any of the following options from the dropdown.

- *Raw Material*: Specifies that the item will be used as raw material.
- *Intermediate*: Specifies that the item will be used as intermediate materials.
- *Finished Goods*: Specifies that the item will be used as finished goods.
- *Primary Packaging*: Specifies that the item will be used as primary packaging material.
- *Secondary Packaging*: Specifies that the item will be used as secondary packaging material.




Set up labor types

Article • 6/12/2024 • 2 min read

You can define labor types and specify standard rates for each type. These labor types can be used in factory setups. For more information, see [Set up a factory](#).

The following procedure outlines how to set up a labor type.



1. Select the Search icon , enter **Labor Types**, and then choose the related link.
The **Labor Types** list page opens.
2. Select **New**.
A new labor type line is created.
3. Enter the relevant information in the following fields:

| Field | Description |
|---------------|---|
| Code | Enter a code for the labor type. |
| Description | Enter a description for the labor type. |
| Rate Per Hour | Enter the rate per hour for the labor type. |



Set up production priority groups

Article • 6/12/2024 • 2 min read

You can define priority groups for production and specify their changeover time. These production priority groups can be used while running the factory schedule. For more information, see [Run the simple factory scheduler](#).

The following procedure outlines how to set up a production priority group.



1. Select the Search icon , enter **Production Priority Groups**, and then choose the related link.

The Production Priority Groups page opens.

2. Select **New**.

A new production priority group is created.

3. Enter the relevant information in the following fields:

| Field | Description |
|---------------|---|
| Code | Enter a code for the production priority group. |
| Description | Enter a description for the production priority group. |
| Rate Per Hour | Specifies the production priority group's sort order based on when the group was created. |

4. On the action bar, select the following actions to change the sort order of the priority group.

| Field | Description |
|-----------|--|
| Move Up | Move the selected priority group up in the sort order. |
| Move Down | Move the selected priority group down in the sort order. |

5. On the action bar, select **Prod. Priority Change Over (mins.)** to specify the changeover time for the production priority groups.

Note

This action is available when at least one priority group is created.

The **Prod. Priority Change Over (mins.)** page opens.

6. Enter the relevant information in the following fields:



| Field | Description |
|-----------------|--|
| Code | Specifies the code representing the production priority group. |
| Description | Specifies the description of the production priority group. |
| Sort Order | Specifies the sort order of the production priority group. |
| Priority Groups | Enter the changeover time in minutes value against each production priority group. |

 Note

- You can create a maximum of 15 priority groups on the **Production Priority Groups** page.
- When adjusting the sort order of a production priority group, related production orders do not update automatically. To reflect the change, navigate to the relevant production order page, re-select the production priority group, and refresh the production order.



Planning

Article • 6/12/2024 • 1 min read

The following topics explain how to manage planning.

- [Generate a production plan](#)
- [Manage suggested demand lines](#)
- [Use the simple planning worksheet](#)



Generate a production plan

Article • 6/12/2024 • 3 min read

The system generates a production plan based on an item's demand as derived from the recent sales orders and demand forecast entries. This calculation helps you start the production plan with the criteria you define.


Prerequisites

The following are the prerequisites to follow before generating a production plan.

- On the **Item Card** page, select a value on the **Item Usage Type** field. For more information, see [Set up item usage types](#).
This prerequisite is not mandatory.
- Ensure a sales order and demand forecast entry for the item for the relevant work date and location exists.

Calculate a production plan



1. Select the Search icon , enter **Calculate Production Plan**, and then choose the related link.
The **Calculate Production Plan** page opens.
2. On the **Options** FastTab, in the **Calculate** group, enter the required information in the following fields:

| Field | Description |
|-------|-------------|
|-------|-------------|



| | |
|--------------------------|---|
| Generate Plan | <p>Select any one of the following plan options:</p> <ul style="list-style-type: none"> • <i>Sales Demand -> Planning Worksheet</i>: The sales order and the sales demand forecast quantity are compared, and the greater quantity is displayed on the Suggested Demand Lines page. Further, the production quantity is updated via the Simple Planning Worksheet page. • <i>Sales Demand -> Production Forecast</i>: The sales order and the sales demand forecast quantity are compared, and the greater quantity is displayed on the Suggested Demand Lines page. Further, you can update the required quantity on the production forecast via the Simple Planning Worksheet page. • <i>Production Forecast -> Planning Worksheet</i>: The quantity in the production order is compared with the production forecast. Further, you can create or update the required quantity in the production order via the Simple Planning Worksheet page. |
| Grouping Level | <p>Select any one of the following options to determine how the information will be grouped on the Suggested Demand Lines page.</p> <ul style="list-style-type: none"> • <i>Item No. and Forecast Date</i>: To group the information by item. • <i>Forecast Date and Item No.:</i> To group the information by forecast dates. |
| Start Date | <p>Select or enter the start date to consider when creating the production plan. This date cannot be less than the current date.</p> |
| End Date | <p>Select or enter the end date to consider when creating the production plan. This date must be greater than the start date.</p> |
| Production Forecast Code | <p>Select a production forecast code assigned to the component. This field is available when the <i>Sales Demand -> Production</i> option is selected in the Generate Plan field.</p> |
| Sales Forecast Code | <p>Select a demand forecast code assigned to the sales items.</p> |
| Location Filter | <p>Select a code for the inventory location where the items being ordered will be registered.</p> |

3. On the **Filter: Item** FastTab, select an option from one of the following fields:

| Field | Description |
|-----------------|------------------------------------|
| Item Usage Type | Select a type of use for the item. |



| | |
|--------------------|---|
| Item Category Code | Select a code to identify the item category. |
| Item No. | Select an item associated with the item category. |

Note

You can make selection in any one of the above fields.

4. On the **Skip Suggested Demand Line** FastTab, enter the required information in the following fields:

Note

This FastTab is visible if you have selected the *Sales Demand -> Planning Worksheet* or the *Sales Demand -> Production Forecast* option in the **Generate Plan** field.

| Field | Description |
|----------------------------|--|
| Skip Suggested Demand Page | Turn on the toggle to skip the creation of suggestion demand lines for the sales demand. |
| Set All to Demand | Turn on the toggle if you want to set all the demand lines to <i>Demand</i> value. This field is available only when the Skip Suggested Demand Page toggle is turned on. |
| Ignore Available Inventory | Turn on the toggle if you want the system to ignore the quantity of items available in the inventory. This field is available only when the Skip Suggested Demand Page toggle is turned on. |

5. Select **OK**.

- If you have selected the *Sales Demand -> Planning Worksheet* option in the **Generate Plan** field and the:
 - **Skip Suggested Demand Page** toggle is turned off, the **Suggested Demand Lines** page opens. For more information, see [Manage suggested demand lines](#).
 - **Skip Suggested Demand Page** toggle is turned on, the **Simple Factory Worksheet** page opens. For more information, see [Use the simple planning worksheet](#).
- If you have selected the *Sales Demand -> Production Forecast* option in the **Generate Plan** field and the:
 - **Skip Suggested Demand Page** toggle is turned off, the **Suggested Demand Lines** page opens. For more information, see [Manage suggested demand lines](#).
 - **Skip Suggested Demand Page** toggle is turned on, the production forecast is updated accordingly.



- If you have selected the *Production Forecast -> Planning Worksheet* option in the **Generate Plan** field, the **Simple Factory Worksheet** page opens. For more information, see [Use the simple planning worksheet](#).

 Note

- When you next open the **Calculate Production Plan** page, the **Use default values from** field is available.
- In the **Use default values from** field, the *Last used options and filters* option is selected by default, it specifies that the options and filters used previously are applied to the page.
- In the **Grouping Level** field, the *Item No. and Forecast Date* option is selected by default, despite the *Forecast Date and Item No.* option previously being selected.



Manage suggested demand lines

Article • 6/12/2024 • 1 min read

The system suggests demand lines based on logical calculations from recent sales orders and demand forecast entries from the defined criteria. This helps you view and process the potential production lines.

The following procedure outlines how to manage the demand lines generated.

1. Open the **Suggested Demand Lines** page via the **Calculate Production Plan** page.

For more information, see [Generate a production plan](#).

2. You can view details of the suggested demand lines in the following fields:

| Field | Description |
|----------------------|--|
| Item No. | Specifies the item number. You can use a range of item numbers to logically group products or view information about them. |
| Forecast Date | Specifies the forecast date assigned to the item. |
| Description | Specifies the description of the item. |
| Item Base UOM | Specifies the base Unit of Measure (UOM) for the item. |
| No. of Sales Order | Specifies the number of sales orders associated with the item. |
| Sales Order No. | Specifies the number of the sales order header associated with the item. |
| Sales Order Line No. | Specifies the number of the sales order line associated with the item. |
| Forecast Qty. | Specifies the forecast quantity assigned to the item. |

| Sales Demand Quantity | Specifies the demand quantity of the released sales order. | Inventory | Specifies the quantity of the item available in the inventory. | | Ignore Available Inventory | Select whether you want to ignore the quantity of items available in the inventory.

This selection affects the ****Qty. to Action**** field value. | | Qty. to Action | Specifies the quantity to be used during the production planning process. This quantity is calculated based on the sales demand and forecast quantity, and the available inventory (if applicable). You can also manually enter a quantity you want to use. | | Use Sales or Forecast | Specifies whether sales demand or forecasts will be used to create the planning lines. You can also manually select ***Demand*** or ***Forecast*** option. | | Action Comment | Specifies a message to alert users about the quantity that will be considered during the production process. |

3. On the action bar, select the following actions as required.



 Note

The actions impact all the **Suggested Demand Lines** page lines.

| Field | Description |
|------------------------------|---|
| Set User Action | <p>Select any of the following:</p> <ul style="list-style-type: none"> • <i>Demand</i>: The Use Sales or Forecast field value for all the lines change to <i>Demand</i>. • <i>Ignore Inventory</i>: The Ignore Available Inventory checkbox is selected for all the lines. • <i>Demand & Ignore Inventory</i>: The Use Sales or Forecast field value changes to <i>Demand</i>, and the Ignore Available Inventory checkbox is selected for all the lines. |
| Reset User Action | <p>Select any of the following actions:</p> <ul style="list-style-type: none"> • <i>Demand</i>: The Use Sales or Forecast field value for all the lines changes back to the initial value. • <i>Ignore Inventory</i>: The Ignore Available Inventory checkbox is cleared for all the lines. • <i>Demand & Ignore Inventory</i>: The Use Sales or Forecast field value changes back to the initial value, and the Ignore Available Inventory checkbox is cleared for all the lines. |
| Register Demand Line | <p>If you have selected <i>Sales Demand -> Planning Worksheet</i> option in the Generate Plan field on the Calculate Production Plan page, you can select this action to register the suggested demand lines into the simple planning worksheet.</p> |
| Register Production Forecast | <p>If you have selected <i>Sales Demand -> Production Forecast</i> option in the Generate Plan field on the Calculate Production Plan page, you can select this action to register the suggested demand lines into the production forecast.</p> |

Upon executing the **Register Demand Line** action, the **Simple Planning Worksheet** page opens. For more information, see [Use the simple planning worksheet](#).

Upon executing the **Register Production Forecast** action, the production forecast is updated accordingly.



Use the simple planning worksheet

Article • 6/12/2024 • 1 min read

On the **Simple Planning Worksheet** page, you can review the production plan generated based on logical calculations, edit the plan to suit your requirements, and create multiple production orders.

The following procedure outlines how to manage the demand lines generated.

1. Open the **Simple Planning Worksheet** page via:

- the **Calculate Production Plan** page.
For more information, see [Generate a production plan](#)
- the **Suggested Demand Lines** page.
For more information, see [Manage suggested demand lines](#).

You can view details of the production order lines in the following fields:

| Field | Description |
|--------------------------|---|
| Item No. | Specifies the item number. |
| Description | Specifies the description of the item. |
| Production Date | Specifies the date of the demand forecast that the line belongs to. |
| No. of Production Orders | Specifies the number of production orders associated with the item. |
| Action Qty | Specifies the quantity of the production order per production order or the sum of the quantities of all the production order lines in the case of the item header. You can enter the quantity values if required. |
| Accept Action | Select the checkbox if you want to accept the action message proposed for the line. |

| Action Message | Specifies the action to be taken by the system to re-balance the demand-supply situation.

The available options are:

- ***Increase***: Increase the quantity of the production order as the production quantity is less than the production plan quantity. If there are multiple production orders, the quantity will be increased in the most recently created order.
- ***Reduce***: Reduce the quantity in the production order as the production quantity exceeds the production plan quantity. If there are multiple production orders, the quantity is decreased in the oldest production order.



- ***Remove***: Remove the production order and cancel the item tracking lines, as the production order does not have an output quantity.
- ***None***: No action is taken as the production quantity of the production order matches the planned production quantity.

If no production order line exists, the system creates a production order line with values to match the production plan quantity. | Ref. Order No. | Specifies the related production order number. | | Ref. Order Line No. | Specifies the line number assigned to the production order number. | | Rem. Qty. on Prod. Order | Specifies the remaining quantity on the production order. | | Item Tracking Exists | Specifies whether the component or item tracking lines exist for the production order. | | Ref. Order Status | Specifies the status of the production order. | | Label Date | Specifies the due date of the production order. You can select or enter a due date if required. | | Verbose Message | Specifies the actions to be executed on the production order. |

2. Select the following actions as required.

Note

The actions impact all the **Simple Planning Worksheet** page lines.

| Action | Description |
|--------------------------|--|
| Set Accept Action | Select the Accept Action checkbox for all lines. |
| Reset Accept Action | Clear the Accept Action checkbox for all lines. |
| Process Production Order | Process the production order for all lines based on the quantity defined in the simple planning worksheet. |

Upon executing the **Process Production Order** action, the production orders are created accordingly.



Scheduling

Article • 6/12/2024 • 1 min read

The following topics explain how to manage scheduling.

- [Set up a factory](#)
- [Set up production processes and process rates](#)
- [Maintain the simple factory setup](#)
- [Set a default simple factory plan for an item](#)
- [View simple factory details in production orders](#)
- [Run the simple factory scheduler](#)
- [View the simple factory schedule](#)
- [Manage the simple production line schedule](#)
- [Split the production order](#)



Set up a factory

Article • 6/12/2024 • 2 min read

You can set up a factory, maintain factory production and process rate lines, and view labor types and production processes.

The following procedure outlines how to set up a factory.



1. Select the Search icon , enter **Simple Factory List**, and then choose the related link.

The **Simple Factory List** page opens.

2. Select **New**.

A new factory line is created.

3. Enter the required information in the following fields:

| Field | Description |
|-----------------------|---|
| Location Code | Select the location code associated with the factory code. |
| Factory Code | Enter the factory code where the production process takes place. |
| Factory Name | Enter the name of the factory. |
| Use Factory Line Bins | Select the checkbox to set different production bin codes per production line. If you clear the checkbox, the production bin codes associated with the location will be set to all the production lines by default. You cannot edit this selection after creating a factory setup for this line. |

4. On the action bar, select **Simple Factory Setup** to view the factory setup details and maintain the production and process rate lines for the factory line. For more information, see [Maintain the simple factory setup](#).

5. Select **Factory Labor** to view or create labor types. For more information, see [Set up labor types](#).

6. Select **Production Processes** to view or create production processes. For more information, see [Set up production processes and process rates](#).




Set up production processes and process rates

Article • 6/12/2024 • 2 min read

You can define production processes and process rates to define the production workflow and calculate the quantity of items to be produced per minute. You can use them in a simple factory setup. For more information, see [Maintain the simple factory setup](#).

The following procedure outlines how to set up a production process and process rates.



1. Select the Search icon , enter **Production Processes**, and then choose the related link.
The **Production Processes** page opens.
2. Select **New**.
A new production process line is created.
3. Enter the required information in the following fields:

| Field | Description |
|-------------|--|
| Code | Enter a code for the production process line. |
| Description | Enter a description for the production process line. |

4. On the action bar, select **Production Process > Process Rates** to create or view process rate lines for the production process.
The **Production Line Process Rates** page opens.
5. Select **New**.
A new process rate line is created.
6. Enter the required information in the following fields:

| Field | Description |
|-------------------------|---|
| Factory Code | Select a code representing the factory where the production process takes place. |
| Location | Select a location code associated with the factory code. |
| Prod. Line Code | Select a production line code associated with the factory. |
| Production Process Code | Select a production process code associated with the production line. |
| Process Type | Specifies the type of resource applied to the production line: <i>Labor</i> or <i>Machine</i> . |



| | |
|-----------------------------------|--|
| Item No. | Select an item. |
| Process UOM Code | <p>Select one of the following options to define the Unit of Measure (UOM) to be applied to the process line.</p> <ul style="list-style-type: none"> • <i>Base UOM</i>: The base UOM associated with the item. • <i>Item UOM</i>: The item UOM associated with the item. • <i>Sales UOM</i>: The sales UOM associated with the item. • <i>Purchase UOM</i>: The purchase UOM associated with the item. |
| Item Process UOM | <p>Specifies the UOM applied to the item based on the selection in the Process UOM Code field.</p> <p>If you have selected <i>Item UOM</i> on the Process UOM Code field, you can select a process associated with the item from the dropdown.</p> |
| Default Labor Count | Specifies the labor count required for the production line by default. |
| Labor Type | <p>Specifies whether the labor count applied to the process line is the default or planned count.</p> <p>If you have selected an item in the Item No. field, the labor type inherits the <i>Planned</i> value.</p> |
| Planned Labor Count | <p>Specifies the labor count required for the process line for a planned item.</p> <p>This field is available when you select a value in the Item No. field.</p> |
| Quantity per UOM | Specifies the quantity of items required per UOM for the process line. |
| Quantity Per Line Per Minute Unit | Specifies the quantity of items that can be produced by this process line per minute based on the defined labor count or the machine. |




Maintain the simple factory setup

Article • 6/12/2024 • 2 min read

You can view the factory setup details and add factory production and process rate lines.

The following procedure outlines how to maintain a factory setup.



1. Select the Search icon , enter **Simple Factory List**, and then choose the related link.
The **Simple Factory List** page opens.
2. Select the desired factory line, and then on the action bar, select **Simple Factory Setup**.
The **Simple Factory Setup** page opens.
3. On the **Factory Setup** FastTab, you can view details of the factory setup in the following fields:

| Field | Description |
|--------------------------|---|
| Factory Code | Specifies the code representing the factory where the production process takes place. |
| Factory Name | Specifies the name representing the factory where the production process takes place. |
| Location Code | Specifies the location code associated with the factory code. |
| Use Factory Line Bins | Specifies whether the production lines will use the production bin codes associated with the location or use different production bin codes per line. |
| Open Shop Floor Bin Code | Specifies the open shop floor bin code value associated with the location. This field is visible only when the Use Factory Line Bins toggle is turned off. |
| To-Production Bin Code | Specifies the to-production bin code associated with the location. This field is visible only when the Use Factory Line Bins toggle is turned off. |
| From-Production Bin Code | Specifies the from-production bin code associated with the location. This field is visible only when the Use Factory Line Bins toggle is turned off. |

4. On the **Factory Production Lines** FastTab, on the action bar, select **New Line** to create a production line, and then enter the required information in the following fields:

| Field | Description |
|----------------------|--|
| Production Line Code | Select a production line code associated with the factory. |



| | |
|-----------------------------------|--|
| Production Line Name | Specifies the selected production line's name. |
| Shop Calendar Code | Select a shop calendar code to be applied to the production line. Regardless of the end time defined in the shop calendar code, the system will consider the end of the day (11:59 p.m.) for calculation. This functionality will be updated to support a shift basis in the forthcoming release. |
| Process Type | Specifies the type of resource applied to the production line. |
| Default Labor Count | Specifies the labor count required for the production line by default. On the action bar, select the Assign Labor Count action to assign a default labor count to the production line. |
| To-Production Bin Code | If the Use Factory Line Bins toggle is turned on, you can select the to-production bin code to be applied to the production line. |
| From-Production Bin Code | If the Use Factory Line Bins toggle is turned on, you can select the from-production bin code to be applied to the production line. |
| Packaging Bin Code | Select a packaging bin code to be applied to the production line. |
| Output to be Auto-Consumed | Select the checkbox if you want this production line to be auto-consumed by other production lines. This field is currently inactive; it will be functional in the forthcoming release. |
| Auto-Consume from Production Line | Select the production line from which the output will be auto-consumed to this production line. Only the production lines with the Output to be Auto-Consumed toggle turned on are available to be auto-consumed. This field is currently inactive; it will be functional in the forthcoming release. |
| Default Time UOM | Select the Unit of Measure (UOM) of time to be applied to the production line by default. |
| Default Label Printer | Select the label of a printer to be used for the production line by default. This field is currently inactive; it will be functional in the forthcoming release. |
| Current Production Date | Specifies the current production date of the production line. This field is currently inactive; it will be functional in the forthcoming release. |



5. On the **Factory Process Rates** FastTab, on the action bar, select **New Line** action to create a process line and then enter the required information in the following fields:

| Field | Description |
|-----------------------------------|---|
| Production Line Code | Select a production line code associated with the factory. The available production lines are defined in the Factory Production Lines FastTab. |
| Production Process Code | Select a production process code associated with the production line. |
| Process Type | Specifies the type of resource applied to the production line: <i>Labor</i> or <i>Machine</i> . |
| Item No. | Select an item to be applied to the process rate line. |
| Process UOM Code | Select one of the following options to define the Unit of Measure (UOM) to be applied to the process line. <ul style="list-style-type: none"> • <i>Base UOM</i>: The base UOM associated with the item. • <i>Item UOM</i>: The item UOM associated with the item. • <i>Sales UOM</i>: The sales UOM associated with the item. • <i>Purchase UOM</i>: The purchase UOM associated with the item. |
| Item UOM Code | Specifies the UOM applied to the item based on the selection in the Process UOM Code field. If you have selected <i>Item UOM</i> on the Process UOM Code field, you can select a process associated with the item from the dropdown. |
| Default Labor Count | Specifies the labor count required for the production line by default. |
| Labor Type | Specifies whether the labor count applied to the process line is the default or planned count. If you have selected an item in the Item No. field, the labor type inherits the <i>Planned</i> value. |
| Planned Labor Count | Specifies the labor count required for the process line for a planned item. This field is available when you select a value in the Item No. field. |
| Quantity per UOM | Specifies the quantity of items required per UOM for the process line. |
| Quantity Per Line Per Minute Unit | Specifies the quantity of items that can be produced by this process line per minute based on the defined labor count or the machine. |



Set a default simple factory plan for an item

Article • 6/12/2024 • 1 min read

You can set up a default simple factory plan for an item. Ensure that a factory setup exists. For more information, see [Set up a factory](#).

The following procedure outlines how to set up a default simple factory plan for an item.

1. Open the desired **Item** page.
2. On the action bar, select **Related > Simple Factory > Default Item Planning**.
The **Simple Factory Item Planning Default** page opens.
3. Enter the required information in the following fields:

| Field | Description |
|---------------------|--|
| Location | Select an inventory location from where the items being ordered will be registered. |
| Factory Code | Select a code representing the factory associated with the location. |
| Prod. Line Code | Select a code representing the production line associated with the factory. |
| Type | Specifies the type of resource applied to the production line. |
| Prod. Process Code | Select a production process code associated with the factory. |
| Prod. Priority Code | Select a code representing the production priority group. |
| Default | Select the checkbox if you want the selected line to be used as this item's default simple factory setup. Only one line can be set as the default factory plan for an item. |



View simple factory details in production orders

Article • 6/12/2024 • 1 min read

You can view the simple factory setup details on the related production order, based on the item setup. Additionally, the system automatically calculates the planned run time, planned start and end date, or time on the factory setup details to help with efficient scheduling.

Note

The current version of this extension does not support the production orders with the **Source Type** field value set as *Family*.

The following procedure outlines how to view the factory setup details on a production order level.

1. Open a desired production order.
2. On the **Schedule** FastTab, you can view details of the schedule lines in the following fields:

| Field | Description |
|--------------------------|--|
| Planned Run Time (mins.) | Specifies the planned run time of the production order in minutes value. |
| Actual Start Date/Time | Specifies the actual start date and time of the production order. This field is currently inactive; it will be functional in the forthcoming release. |
| Actual End Date/Time | Specifies the actual end date and time of the production order This field is currently inactive; it will be functional in the forthcoming release. |
| Actual Run Time (mins.) | Specifies the actual run time of the production order in minutes value. This field is currently inactive; it will be functional in the forthcoming release. |
| Operational Status | Specifies the status of the production order. This field is currently inactive; it will be functional in the forthcoming release. |
| Factory Code | Specifies the code representing the factory associated with the item. You can select a related factory code if required. |
| Prod. Line Code | Specifies the code representing the production line associated with the item. You can select a related production line code if required. |
| Type | Specifies the type of resources applied to the production line. |
| Prod. Process Code | Specifies the production process code associated with the item. You can select a production process code if required. |



| | |
|---------------------|--|
| | <ul style="list-style-type: none"> • If you have run the simple factory scheduler and you changed the Prod. Process Code field value, you must re-schedule via the Simple Factory Scheduler page and refresh the production order to update the change. • If you have partially posted a production order and changed the Prod. Process Code field value, you must re-schedule via the Simple Factory Scheduler page and refresh the production order to update the change. |
| Prod. Priority Code | <p>Specifies the code representing the production priority group associated with the item. You can select a production priority code if required.</p> <ul style="list-style-type: none"> • If you have run the simple factory scheduler and you changed the Prod. Priority Code field value, you must re-schedule via the Simple Factory Scheduler page and refresh the production order to update the change. • If the sort order of a production priority group is changed, the change is not automatically reflected here. You can re-select the production priority group and refresh the production order to update the change. |
| Sequence number | <p>Specifies the sequence number of the production order.</p> <ul style="list-style-type: none"> • If you have run the simple factory scheduler, refresh the production order to update the sequence number. • If you have partially posted a production order, the sequence number is not updated based on the posted orders. |
| Ready to Pick | <p>Select whether the activity is ready to be picked. This toggle is currently inactive; it will be functional in the forthcoming release.</p> |

 **Note**

If you have partially posted a production order, you cannot update the above field values.




Run the simple factory scheduler

Article • 6/12/2024 • 2 min read

You can filter the criteria to view relevant production orders and streamline the scheduling process.

The following procedure outlines how to use the factory scheduler.



1. Select the Search icon , enter **Simple Factory Scheduler**, and then choose the related link. The **Simple Factory Scheduler** page opens.
2. On the **Options** FastTab, enter the required information in the following fields:

| Field | Description |
|-------------------------|--|
| Date From | Select or enter the starting date of the simple factory schedule filter. |
| Date To | Select or enter the ending date of the simple factory schedule filter. |
| Location Code | Select the location code. |
| Factory Code | Select the factory code associated with the location. |
| Prod. Line Code | Select the code representing the production line. |
| Production Order Status | Select the status of the production order. |

3. On the **Production Priorities** FastTab, turn on the **Use Prod. Priorities** toggle if you want the simple factory scheduler to use production priorities.

Note

The **Use Prod. Priorities** toggle is turned on by default.

4. Select **OK**.

The **Simple Factory Schedule View** page opens. For more information, see [View the simple factory schedule](#).



View the simple factory schedule

Article • 6/12/2024 • 3 min read

You can filter and view multiple production orders in factories that match the filter criteria you define. This helps facilitate efficient scheduling and production management.

The following procedure outlines how to view the simple factory schedule.

1. Open the **Simple Factory Schedule View** page in either of the following ways:

- Via the **Simple Factory Scheduler** page. For more information, see [Run the simple factory scheduler](#).



- Select the Search icon , enter **Simple Factory Schedule View**, and then choose the related link.

2. On the **Simple Factory Schedule View Filters** FastTab, you can adjust the filters in the following fields:

| Field | Description |
|------------------------------|--|
| Due Date | Select or enter the date of the production order. |
| Location Code | Select the location code. |
| Factory Code | Select the factory code associated with the location. |
| Production Line Process Type | Select the type of resource applied to the production line. |
| Production Order Status | Select the status of the production order. |
| Production Line | Select the production line code associated with the factory. |

You can view details of the simple factory schedule in the following fields:

| Field | Description |
|---------------------------|---|
| Production Order Due Date | Specifies the due date of the production order. |
| Location Code | Specifies the location code associated with the factory code. |
| Factory Code | Specifies the code representing the factory where the production process takes place. |
| Production Line Code | Specifies the code representing the production line. |
| Production Line Name | Specifies the name of the production line. |



| | |
|--------------------------|---|
| Type | Specifies the type of resource applied to the production line. |
| Default Labor Count | Specifies the labor count required for the production line by default. |
| Production Order Status | Specifies the status of the production order. |
| No. of Production Orders | Specifies the number of production orders. |
| Planned Start Date/Time | Specifies the planned start date and time of the first production order. |
| Planned End Date/Time | Specifies the planned end date and time of the last production order. |
| Actual Start Date/Time | Specifies the actual start date and time of the production order. This field is currently inactive; it will be functional in the forthcoming release. This field is currently inactive; it will be functional in the forthcoming release. |
| Actual End Date/Time | Specifies the actual end date and time of the production order. This field is currently inactive; it will be functional in the forthcoming release. |

3. On the action bar, select **Simple Factory Scheduler** to update the filters on the **Simple Factory Scheduler** page.

 Note

The **Use Prod. Priorities** toggle is turned off by default.

4. On the action bar, select **Prod. Line View** to view all the production orders in detail. For more information, see [Manage the simple production line schedule.](#)

 Note

In the current system, regardless of the end time specified in the shop calendar code for the production line, the system considers the end of the day, 11:59 p.m, for calculations. This feature will be enhanced in the forthcoming release to support shift-based calculations.



Manage the simple production line schedule

Article • 6/12/2024 • 2 min read

You can view the details of the production orders on the **Simple Prod. Line Schedule View** page, opened via the **Simple Factory Schedule View** page. For more information, see [View the simple factory schedule](#). Additionally, you can manage the production sequence, change a production order to a different production line, and split a production order.

The following procedure outlines how to manage the production line schedule.

1. Select the relevant production order on the **Simple Factory Schedule View** page, and then on the action bar, select **Prod. Line View**.

The **Simple Prod. Line Schedule View** page opens.

2. You can view details of the production order details in the following fields:

| Field | Description |
|--------------------------|--|
| Operational Status | Specifies the status of the production order process. |
| Production Order No. | Specifies the number of the production order. |
| Status | Specifies the status of the item at the production process level. |
| Source No. | Specifies the item number. |
| Description | Specifies the description of the item. |
| Quantity | Specifies the quantity of items in the production order. |
| Prod. Priority Code | Specifies the code representing the production priority. |
| Sequence No. | Specifies the sequence number of the production order. |
| Starting Date/Time | Specifies the planned start date and time of the production order. |
| Ending Date/Time | Specifies the planned end date and time of the production order. |
| Planned Run Time (mins.) | Specifies the planned run time of the production order in minutes value. |

3. On the **Prod. Order Components** FastTab, you can view details of the production order components in the following fields.

| Field | Description |
|----------------------|--|
| Prod. Order Line No. | Specifies the number of the production order line. |



| | |
|------------------------|--|
| Item No. | Specifies the item number. |
| Item Description | Specifies the description of the item. |
| Component Item No. | Specifies the number of the component item. |
| Due Date | Specifies the due date of the component item. |
| Description | Specifies the description of the component item. |
| Quantity Per | Specifies the quantity of components per production order. |
| Unit of Measure Code | Specifies the code representing the Unit of Measure applied to the component item. |
| Flushing Method | Specifies the flushing method for the component item. |
| Expected Quantity | Specifies the expected quantity of the component item. |
| Remaining Quantity | Specifies the remaining quantity of the component item. |
| Bin Code | Specifies the code representing the bin associated with the component item. |
| Substitution Available | Specifies whether there is a substitution available for the component item. |

4. On the action bar, select the following actions to change the production sequence as required.

| Action | Description |
|-----------|---|
| Move Up | Move the selected production order line up in the sort order. |
| Move Down | Move the selected production order line down in the sort order. |

5. On the action bar, select **Change Line** to move the production order(s) to another production line. The system reschedules the production orders and updates the sequence number accordingly.

 **Note**

This action does not support partially posted production orders.

6. On the action bar, select the **Split Order** to split the selected production order based on quantity. For more information, see [Split the production order](#).

7. On the action bar, select **Simple Factory Scheduler** to run the simple factory scheduler. For more information, see [Run the simple factory scheduler](#).



 Note

We recommend not using the sorting filter on the **Prod. Order No.** and **Sequence No.** fields before running the scheduler.

8. On the action bar, select the **Production Order** to open the production order related to the selected line.



Split the production order

Article • 6/12/2024 • 1 min read

You can split a production order into multiple production orders and distribute the quantity among them via the **Simple Prod. Line Schedule View** page. For more information, see [Manage the simple production line schedule](#).

Note

This functionality is not applicable for production orders assigned to multiple lots.

The following procedure outlines how to split a production order.

1. On the **Simple Prod. Line Schedule View** page, on the action bar, select **Split Order**.
The **Simple Prod. Order Split** page opens.
2. You can view details of the production order in the following fields:

| Field | Description |
|----------------------|--|
| Status | Specifies the status of the production order. |
| Prod. Order No. | Specifies the number of the production order. |
| Prod. Order Quantity | Specifies the quantity of items in the production order. |
| Production Line Code | Specifies the code representing the production line. |
| Remaining Quantity | Specifies the quantity of items remaining in the current production order after the quantity of items are split into a new production order. |

You can view details of the item in the following fields:

| Field | Description |
|----------------------|---|
| Item No. | Specifies the item number. |
| Description | Specifies the description of the item. |
| Quantity | Specifies the quantity of items in the production order. |
| Unit of Measure Code | Specifies the code representing the Unit of Measure applied to the item. |
| Finished Quantity | Specifies the quantity of items in the production order with a finished status. |



Remaining Quantity

Specifies the quantity of items remaining in the current production order after the quantity of items are split into a new production order.

3. On the **Split Quantity** field, enter the quantity of the production order you want to split to make another production order.
4. On the action bar, select **Split Order** to split the production order with the quantity specified in the **Split Quantity** field.
The **Prod. Order Quantity**, **Quantity**, and **Remaining Quantity** fields are updated accordingly.
5. Select **Close**.
The production orders with the split quantity are created on the **Simple Prod. Line Schedule View** page.

