

FeneTech, Inc.

FeneVision® BI User Manual



FeneVision® Business Intelligence User Manual

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FeneTech, Inc.
32125 Solon Road, Suite #100
Solon, OH 44139
Phone 330-995-2830 • Fax 330-954-7008
www.fenetech.com

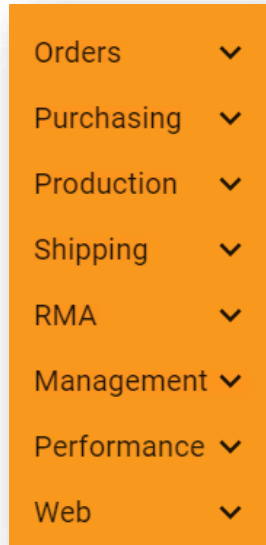
Table of Contents

- TABLE OF CONTENTS.....3**
- OVERVIEW4**
 - STARTING.....4
 - HOME5
 - MULTI-MANUFACTURING LOCATIONS5
- USING BI6**
 - REPORT PARAMETERS.....6
 - REPORT COMMANDS.....7
 - BI REPORTS7
 - Orders*8
 - Purchasing*25
 - Production*.....31
 - Shipping*56
 - RMA*61
 - Management*67
 - Performance*94
 - Web*.....101
 - BI Map*.....114
- SETUP119**
- HELP120**

Overview

FeneVision Business Intelligence (BI) is an intranet application representing the tools and systems of the user's company. BI assists in providing real time information that can be used for strategic planning. Data is collected from the family of FeneVision software products and integrated to provide this information. The instantaneous status of daily production provides a clear view of what is happening on the factory floor, allowing management to be proactive by minimizing bottlenecks and maximizing production. All reports generated in BI reflect the user's most recent activity.

BI reports are organized within seven drop-down menus that appear after selecting the menu on the left side of the screen.

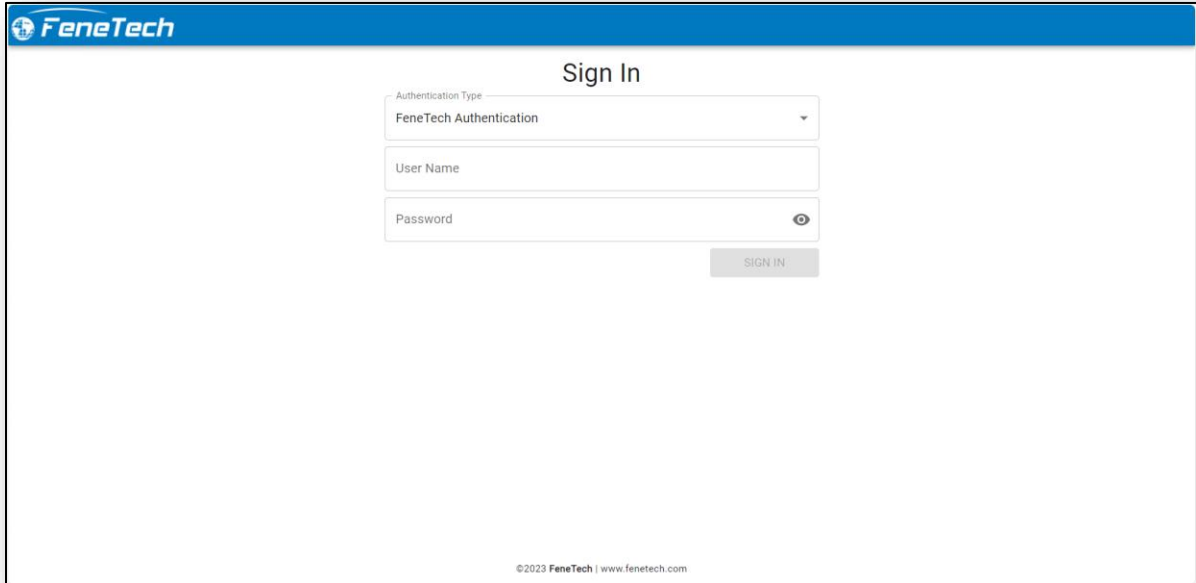


BI may be accessed either by selecting on the globe icon in FeneVision Core or by typing the following address into Microsoft® Internet Explorer's address bar: <http://YourServerName/BI/>. This site may also be added to Internet Explorer favorites or set as a homepage.

Report security is controlled through the SQL Server Reporting Services (SSRS) 'Report Server Manager'. Through the 'Report Server Manager', the user will have the ability to specify which logons have access to certain reports. The logons specified would be the same the user uses to log into windows since the 'Report Server Manger' utilizes windows authentication.

Starting

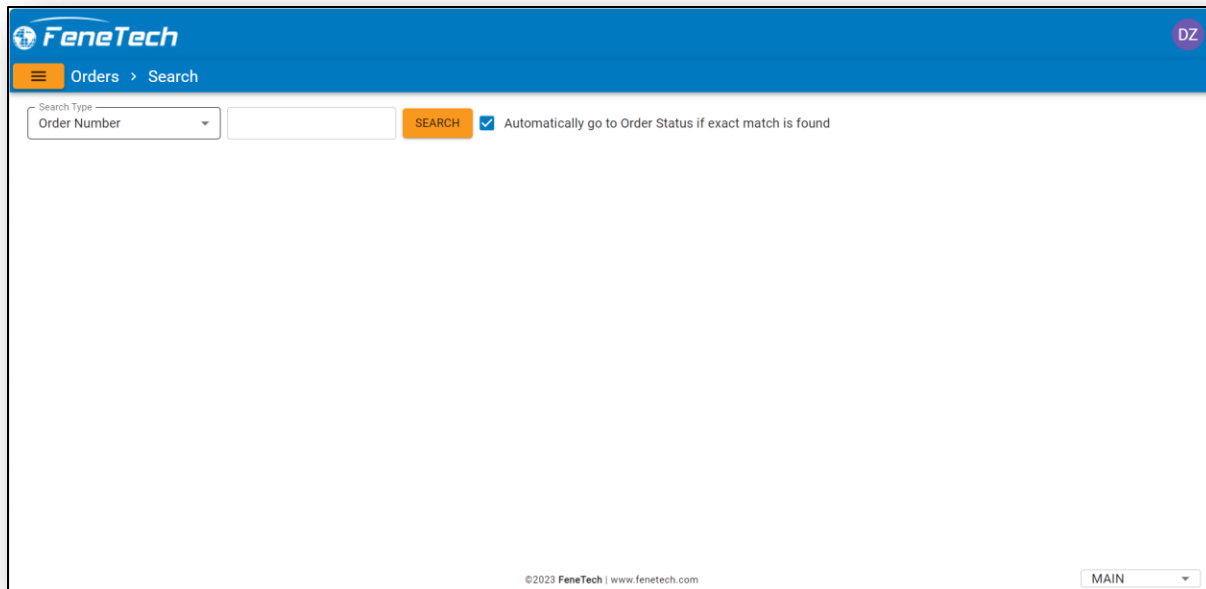
1. Enter the FeneVision BI URL into the address toolbar of a browser window.
2. A login screen, similar to the one below, will be displayed.



3. Enter the assigned user name and password.
4. Select 'Sign In'.

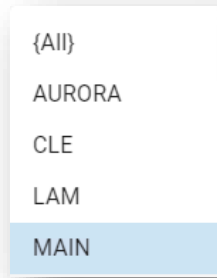
Home

Once BI is opened, the 'Search' screen appears. From any other screen in FeneVision BI, the user can select the 'Orders' >> 'Search' menu item to return to the 'Search' page (shown below).



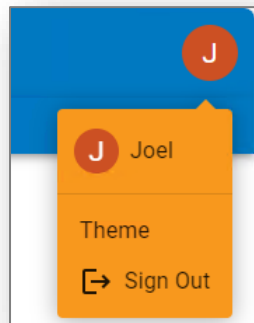
Multi-Manufacturing Locations

By using the drop-down located in the lower right corner of the screen, user can indicate at which manufacturing location BI will draw its information.



The location defaults to the location of the user that had logged into BI. The location drop-down is used for particular reports containing a 'location' parameter.


The user can sign out after clicking the user icon at the upper right corner of the home page.







Using BI

The following two sections will help the user define report parameters and utilize report commands in order to expedite the use of BI reports.

Report Parameters

BI report parameters vary according to the type of report that is being accessed. The image below represents a more extensive group of filters. The report parameters can be hidden or revealed by using the  between the report parameters and the report commands.

Start Date:	<input type="text" value="9/19/2023"/>		End Date:	<input type="text" value="9/26/2023"/>	
Type:	<input type="text" value="Order"/>				
Currency:	<input type="text" value="Canadian Dollar"/>				

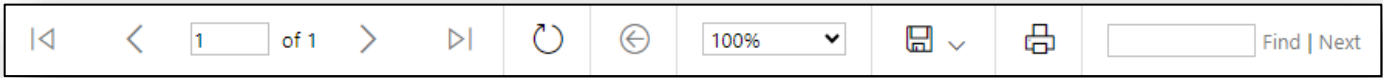
When viewing reports that calculate a dollar amount total, a Currency parameter will also show. If a currency parameter is available, the user will only see the records that correspond with the selected currency. Users may not select multiple currencies at once.

Note: In this manual, reports that only require the user to enter the start and end dates will not display the report parameters section. Reports that provide the option of filtering by additional means other than the start and end dates will display the

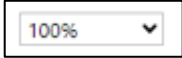
report parameters section of the report. When changing start and end dates or modifying filters, always select View Report to see the modified report.

Report Commands

Above the actual report data, the following ribbon of commands exists for each report.



Navigate to the various pages of the report.



Adjust the size of the report.



Enter letter or number values to conduct a search in the report.



Drop-down that allows the user to export and save BI reports in the following file formats:

Word
Excel
PowerPoint
PDF
TIFF file
MHTML (web archive)
CSV (comma delimited)
XML file with report data
Data Feed



Refresh. Users can update information in FeneVision Core, Tracking, and Trucking, return to the report, select Refresh, and receive real time data.



Note: Use View Report to view reports after report parameters have been changed. Use Refresh to refresh data after FeneVision data has been changed.

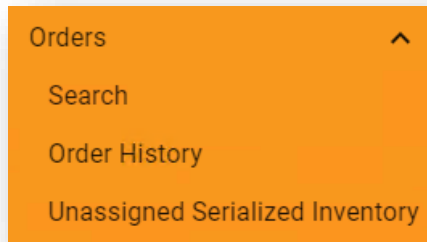


Print.

BI Reports

Orders

The 'Orders' menu outlines each function related to orders configured in FeneVision Core.



Search

The 'Search' screen is the default home page displayed when FeneVision BI is opened. Users can search for any order entered into FeneVision Core from this screen.

To search for an order, complete the following:

1. Determine what information is known about the order.
2. Enter the known information into one of several search fields:

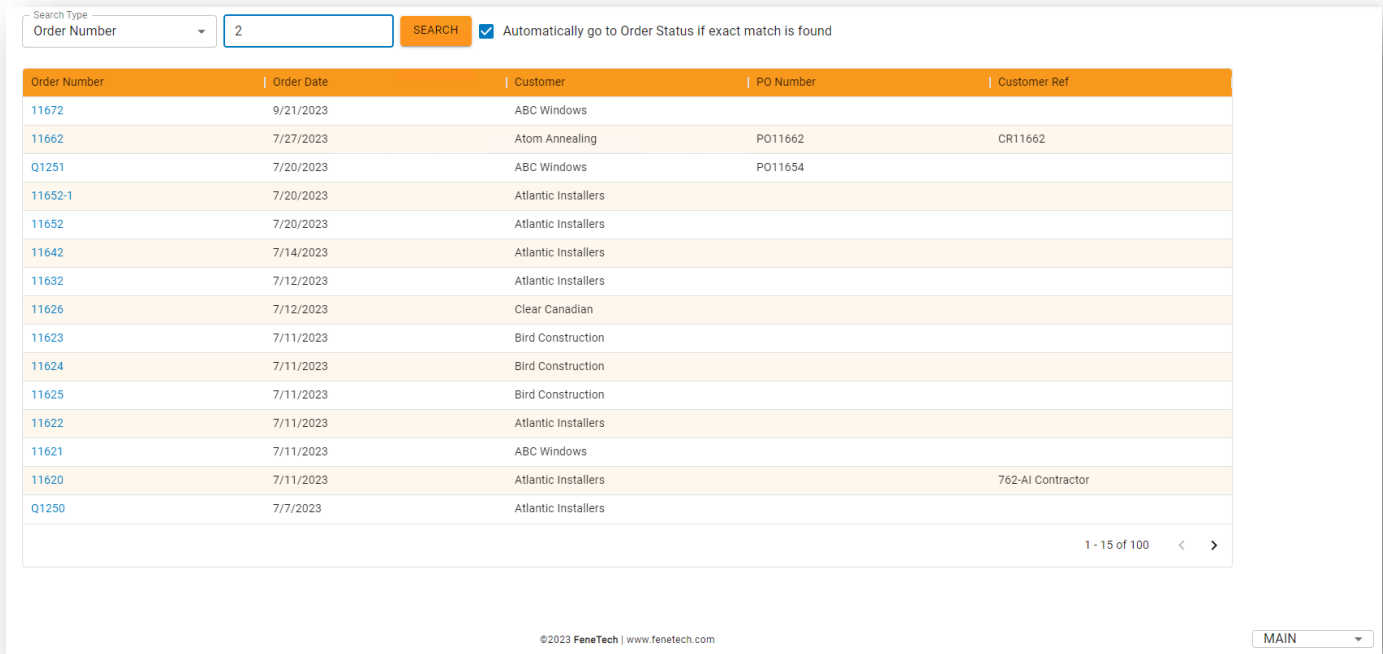
- **Order Number** – Enter partial or full order number.
- **Remote Order Number** – Enter partial or full remote order number from ROE or Web.
- **PO Number** – Enter partial or full purchase order number.
- **Customer ID** – Enter Customer identification number
- **Customer Name** – Enter customer name
- **Customer Reference** – Enter customer reference information
- **Shipping Company Name** – Enter company name specified in the 'Name' field in Order Entry. Typically used for orders created for a generic customer and the actual customer name is entered at the time the order is created in Order Entry.
- **Address** – Enter partial or full address
- **Phone Number** – Enter partial or full phone number for customer
- **System Size** – Enter part dimensions in system unit of measure. Acceptable formats include the following:
 - 44.5
 - 44 1/2
 - 40 x 50 x 1
 - 33 1/2 x 46

Note: When entering size, any portion of the part dimension (either width or height) will return all results with that that particular dimension.

3. Select the checkbox next to 'Automatically go to order status if match is found' to go straight to the order status report (*optional*).
4. Select 'Search' or press 'Enter' to submit the search.
5. If the search finds multiple entries, all orders associated with the search criteria will be listed.

For example, if 'WIN' was entered into the 'Customer Name' field, the following entries could be returned: 'Baldwin', 'Window Systems', and 'Winners Home Improvement'. This is also described as a 'like' search.

In the image below the user searched '2' for Order Number and every order containing a '2' in the number is returned.



The screenshot shows a search interface with a search type dropdown set to 'Order Number', a search input field containing '2', a 'SEARCH' button, and a checked checkbox for 'Automatically go to Order Status if exact match is found'. Below the search bar is a table with the following columns: Order Number, Order Date, Customer, PO Number, and Customer Ref. The table contains 15 rows of data, all of which include the digit '2' in the Order Number column. The footer of the page includes the copyright notice '©2023 FeneTech | www.fenetech.com' and a 'MAIN' dropdown menu.

Order Number	Order Date	Customer	PO Number	Customer Ref
11672	9/21/2023	ABC Windows		
11662	7/27/2023	Atom Annealing	PO11662	CR11662
Q1251	7/20/2023	ABC Windows	PO11654	
11652-1	7/20/2023	Atlantic Installers		
11652	7/20/2023	Atlantic Installers		
11642	7/14/2023	Atlantic Installers		
11632	7/12/2023	Atlantic Installers		
11626	7/12/2023	Clear Canadian		
11623	7/11/2023	Bird Construction		
11624	7/11/2023	Bird Construction		
11625	7/11/2023	Bird Construction		
11622	7/11/2023	Atlantic Installers		
11621	7/11/2023	ABC Windows		
11620	7/11/2023	Atlantic Installers		762-AI Contractor
Q1250	7/7/2023	Atlantic Installers		

6. Selecting a particular order from the 'Search' results will take the user to the 'Order Status' report. Selecting the 'Customer' name opens the 'Order History' report filtered for that customer.

History

The 'Order History' report displays all open or complete orders by customer and order date. This report is helpful when looking to see the history of orders over a select period of time, specifically for an individual customer. It defaults to a start date of 7 days prior to the current date, an end date of the current date, and a filter of open orders for the selected customer and all sites for that customer.

'Order History' can be accessed by searching for a specific customer name from the Order Search screen. Upon searching, the report will automatically display a list of open orders for the searched customer.

Start Date: 3/1/2023 End Date: 9/26/2023
 Filter: Open Orders Customer: FeneTech
 Site: {All}

1 of 1 100% Find | Next

Order History

Start Date: 3/1/2023 End Date: 9/26/2023 Filter: Open Orders Location: MAIN
 Customer: FeneTech Site: {All}

Order	Type	Date	PO	Customer Ref.	Customer	SqFt	Mfg Qty	Released Qty	Complete Qty
11666	Order	7/27/2023	PO11666		FeneTech [18]	438.89	40	40	40
11549	Order	7/3/2023			FeneTech [18]	597.35	65	0	0
11545	Order	6/30/2023			FeneTech [18]	12.00	1	0	0
11303	Order	3/9/2023			FeneTech [18]	199.38	24	0	0
11302	Order	3/9/2023			FeneTech [18]	200.00	18	18	0
11301	Order	3/9/2023			FeneTech [18]	199.38	24	24	0
11300	Order	3/9/2023			FeneTech [18]	199.38	24	26	0
11299	Order	3/8/2023			FeneTech [18]	199.38	24	24	0
11298	Order	3/8/2023			FeneTech [18]	189.41	24	24	0

9/26/2023 10:44:26 AM 1 of 1

To search for all open or complete orders over a given period, complete the following:

1. Enter the start and end dates.
2. Select to view either 'Open Orders' or 'Complete Orders' from the 'Filter' drop-down.
 - **Open orders** – Open orders with an order date between the starting date and ending date that have not been invoiced.
 - **Complete orders** – Displays closed orders that have been fully invoiced and posted with an order date between the starting date and ending date
3. Filter by customer or site (all optional).
4. Select .

The following information is detailed in the 'Order History' report:

- **Order** – Order number. Links to the 'Order Status' report.
- **Type** – Type of order, e.g., 'Quote', 'Order', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'.
- **Date** – Order date.
- **PO** – Purchase order number.
- **Customer Reference** – Text that uniquely identifies the particular order.
- **Customer** – Customer name.
- **Square Feet** – Order's total number of square feet.
- **Qty** – Quantity to be produced.
- **Released Qty** – Quantity released to production.
- **Complete Qty** – Quantity that has received a status of 'Complete' from a production station.

Order Status

The 'Order Status' report provides detailed information about an order. This report is helpful when relaying the status and all related information about a specific order to a customer.


Users can access the report by selecting the order number link on the 'Order History' report or by searching for the order through the 'Order Search' screen.

Order Status

ORDER OPEN

Order: 11298	Order Date: 3/8/2023	PO Number:
Order Type: Order	Req Date: 3/15/2023	Customer Ref.:
Customer: FeneTech	Ack Date: 3/8/2023	Order Contact:
Site: 18	Invoice Date:	Salesperson: Jamison, Janice
Project:	Route: {None}	Sales Code:
Schedule: 5420-JS DH 3/8/23	Target Ship Date: 3/15/2023	Entered By: Joel
Release Date: 3/8/2023	Ship Date:	Remote Order:

Addresses	Requirements	Production Status	Container Status	Related Orders	Capacity	Routes
---------------------------	------------------------------	-----------------------------------	----------------------------------	--------------------------------	--------------------------	------------------------

Item	Qty	Part	Size	Price
1	6	8100SH.TWIN-SINGLE HUNG TWIN EXACT SIZE, WHITE, FACTORY MULL, HEAD EXPANDER, NAIL FIN	60 W X 38 H X 1 T	\$5,095.08 
1.1	6	8660DH-DOUBLE HUNG EXACT SIZE, WHITE, CLEAR/CLEAR IG, ARGON GAS, NO SCREEN, FOAM WRAP, Sure didn't, Single Lock	29 13/16 W X 38 H	
1.2	6	8660DH-DOUBLE HUNG EXACT SIZE, WHITE, CLEAR/CLEAR IG, ARGON GAS, NO SCREEN, FOAM WRAP, Sure didn't, Single Lock	29 13/16 W X 38 H	
1.3	6	MULL-VM-Vertical MULLION 1/8" WHITE	3/8 W X 38 H	

SUBTOTAL: [\\$5,095.08](#)

TOTAL: [\\$5,095.08](#)

Order Notes:


9/26/2023 10:47:05 AM

1 of 1

Select the (blue) links to move to another report.

Header Information

- **Order Status** – In bold red text, indicates the status of the order.
- **Order** – Order number. Links to the 'Order Status' report.
- **Order Type** – Type of order—quote, order, invoice only, credit, manufacturing, or forecast.
- **Customer** – Customer name.
- **Site** – Customer site name.
- **Project** – The name of the project if the order is associated with a project.
- **Schedule** – Schedule identifier.
- **Release Date** – Date the order was released to production.
- **Order Date** – Date the order was entered.
- **Req Date** – Date the order is required by the customer.
- **Ack Date** – Date the order was acknowledged.
- **Invoice Date** – Date the order was invoiced. Links to the 'Invoice History' report if the order has been invoiced.
- **Route** – Shipping route on which the order will be placed. Links to the 'Shipping History' report.

Note: The  icon will next to the route if images exist for the route that were added in the Mobile Delivery application.

- **Target Ship Date** – Date the order is expected to ship.
- **Ship Date** – Actual date the items were shipped.
- **PO Number** – Purchase order number.
- **Customer Ref** – Additional identifying information regarding the customer, e.g., customer ID.
- **Order Contact** – Person to contact at the customer’s facility regarding the order.
- **Salesperson** – Person at the manufacturing facility responsible for securing the sale.
- **Sales Code** – Code that can be used to provide further order tracking for the customer, e.g., special promotions.
- **Entered By** – Personnel responsible for entering the order.
- **Remote Order** – Order number if the order was uploaded from FeneVision Web or ROE.

Grid Information

- **Addresses** – Link to the ‘Addresses’ report that lists the invoice address and shipping address.
- **Purchasing Requirements** – Link to the Item ‘Order Purchasing Requirements’ report to view what purchased parts are needed to produce the order.
- **Production Status** – Link to the ‘Order Production Status’ report to view the current status of each unit from the order.
- **Container Status** – Link to the ‘Order Containers’ report to view the containers in which the order’s units currently reside.
- **Related Orders** – Link to the ‘Related Orders’ report to view what other orders are related to the current order.
- **Capacity Status** – Link to the ‘Capacity Status’ report to view the progress of the order through its assigned capacity work cells.
- **Price** – Link to the ‘Item Price Breakdown’ report for a breakdown of how the price was obtained.
- **Item Number** – Link to the ‘Line Item Bill of Materials’ report for a view of the parts within the BOM of the ordered item.
- **Order Notes** – Link to the ‘Order Notes’ screen that allows the user to enter notes.

Invoice History

The ‘Invoice History’ report provides detailed information about an order’s invoice. This report can be used to help determine all invoices related to an order, the amount on each invoice, and whether the invoice has been posted.

Users can access the ‘Invoice History’ report in the following ways:

1. In the ‘Order Status’ report, select the ‘Invoice Date’ link.
2. In the ‘Sales by Invoice’ report, select the ‘Invoice’ link.

Invoice History					
Order:		11345			
Invoice Number:	101	Invoice Date:	3/17/2023	Posted:	Yes
			Location:	MAIN	
Item	Qty	Part	Size	Price	
1	1	NSOTaxablePart -	50 W X 50 H	\$22.00	
2	1	NSONonTaxablePart -	50 W X 5 H	\$13.00	
				Subtotal	\$35.00
				Tax	\$0.00
				Total	\$35.00

The ‘Invoice History’ report contains the following information:

- **Order Number** – Alphanumeric identifier of the order. Linked to the ‘Order Status’ report.
- **Invoice Number** – Alphanumeric identifier of the invoice.
- **Invoice Date** – Date of the invoice.
- **Posted** – ‘Yes’ or ‘No’ designation as to whether the invoice has been posted.
- **Item** – Item number of the item being invoiced.
- **Qty** – The number of units from that item that were invoiced on the particular invoice.
- **Part** – The part identifier.
- **Size** – Ordered dimensions of the part.
- **Price** – Price being invoiced for that item on the particular invoice.

- **Subtotal** – Subtotal of this invoice. This is the sum of the line item prices.
- **Tax** – Amount of tax on the invoice.
- **Total** – Total amount on the invoice. Subtotal + Tax.

Shipping History

The 'Shipping History' report details the history of the order with regard to its shipping status. This report is used to determine the original order quantity, the shipped quantity, and the delivered quantity of each route connected with the order.

Note: Users can also filter the report by line item and can include unshipped items. Unshipped items will display at the top of the report.


Users can access the 'Shipping History' report in the following ways:

1. In the 'Order Status' report, select the 'Route' link.
2. In the 'Route Orders' report, select the 'Order' link.
3. In the 'Related Orders' report, select the 'Route' link.

Shipping History				
Order: 273647		Target Ship Date:		Ship Date: 1/20/2015
Route: DZ0120-1				
Item	Part	Order Qty	Shipped Qty	Delivered Qty
1	AI14 - ANNEALED INSULATING 1/4"	2	2	0 Details
2	AI14 - ANNEALED INSULATING 1/4"	5	5	0 Details
3	AI316 - ANNEALED INSULATING 3/16"	4	4	0 Details
Totals		11	11	0

The 'Shipping History' report provides the following information:

- **Order** – Order number. Links to the 'Order Status' report.
- **Route** – The name of the route on which the order has been placed. Links to the 'Route Orders' report.
- **Target Ship Date** – Date the order is expected to ship.
- **Ship Date** – Actual date the items were shipped.
- **Item** – Line item number.
- **Order Qty** – The number of units on the order for that line item.
- **Shipped Qty** – The number of units that have shipped for that line item.
- **Delivered Qty** – The number of units that have been delivered for that line item.
- **Details** – Links to the 'Shipping Details' report.

Note: The  icon will appear in this column if images exist for the item that were added in the Mobile Delivery application. If images were marked important, that icon will appear with a red exclamation point.

- **Totals** – Total quantities of the line items on the order.

Note: For parts with sub line items, such as Opening Designer, the sub line items will display underneath the ordered part with quantities indicating units shipped.

Route Orders

The 'Route Orders' report lists and details each order on the selected route. This is helpful when determining how many stops are on a route, as well as how many orders/which orders are on each stop of the route.

Users can access the 'Route Orders' report in the following ways:

1. In the 'Shipping History' report, select the 'Route' link.
2. In the 'Routes' report, select the 'Route ID' link.

Route Orders						
Route:	BUF 10/23/2015		Ship Date:	10/6/2015		Delivered Date:
Stop:	1		Arrival Date:			
Order	Packing Slip	Customer	Order Date	Req Date	Target Ship Date	Comments
O-M188CONT	RPS04	Arden Glass	10/5/2015	10/23/2015	10/23/2015	
O-M189CONT	RPS05	Arden Glass	10/5/2015	10/23/2015	10/23/2015	
O-M192CONT	RPS06	Arden Glass	10/5/2015	10/23/2015	10/23/2015	
O-M194CONT	RPS07	Arden Glass	10/5/2015	10/23/2015	10/23/2015	
O-M195CONT	RPS08	Arden Glass	10/5/2015	10/23/2015	10/23/2015	
Stop:	2		Arrival Date:			Delivered Date:
Order	Packing Slip	Customer	Order Date	Req Date	Target Ship Date	Comments
O-M196	RPS09	Kelly Window and Entry Systems	10/6/2015	10/7/2015	10/7/2015	

The following information is detailed in the 'Route Orders' report:

- **Route** – Route identifier.
- **Ship Date** – Date the route was shipped.
- **Stop** – Stop number. 'Stops' are listed in sequential order.
- **Arrival Date** – Date the shipment is expected to arrive at the customer. Set through 'Route Builder'.
- **Delivered Date** – Date the shipment was delivered to the customer. Set through the FeneVision® Delivery Tracking application.
- **Order** – Order identifier. Links to the 'Shipping History' report.
- **Packing Slip** – Identifier of the packing slip. This identifier is used in accounting so that it can be determined how many shipments were made for an order and what was shipped on each.
- **Customer** – Customer receiving the order.
- **Order Date** – Date the order was entered.
- **Req Date** – Date the order is required by the customer.
- **Target Ship Date** – Date the order is expected to ship.
- **Comments** – Any comments associated with the order and its delivery.

Shipping Details

The 'Shipping Details' report gives a detailed view of what units were shipped on a route. This is helpful for tracking down individual units when orders have been partial shipped.

'Shipping Details' is accessed by selecting the 'Details' link from the 'Shipping History' report.

Shipping Details						
Route:	CLE 062720		Order-Item:	9152-1		Part:
						8660DH - DOUBLE HUNG
ID	Shipped Qty	Delivered Qty	Part	Size	Container	Comments
4912 '1' 0'0	1	1	8660DH - DOUBLE HUNG	36 W X 60 H X 3 1/4 T		
						

The following information is available in the 'Shipping Details' report:

- **Route** – Identifier of the route.
- **Order-Item** – Identifier of the order and line item.

- **Part** – Alphanumeric identifier of the part.
- **ID** – SUMP (Schedule Number, Unit Number, Master Key, Parent Key).
- **Shipped Qty** – Number of items shipped.
- **Delivered Qty** – Number of items delivered.
- **Part** – Detailed identifier of the part.
- **Size** – Part dimensions.
- **Container** – Container in which the unit resides.
- **Comments** – Any comments associated with the unit.
- **Images** – If pictures were taken during delivery, they will show below the the unit information.

Addresses

The 'Addresses' report displays the address for invoicing and the address for shipping.

Addresses	
Order:	9117
Invoice Address	
Contact:	JT Barrett
Title:	
Phone:	330.995.2830
Mobile:	330.995.2830
Fax:	
Address:	FeneTech 260 Campus Dr. Aurora, OH 442032
Shipping Address	
Contact:	JT Barrett
Title:	
Phone:	330.995.2830
Fax:	
Address:	FeneTech 260 Campus Dr. Aurora, OH 442032
Route:	Chicago
Ship Via:	Cust. Pickup
Comments:	

The 'Addresses' report provides the following information:

- **Order** – Alphanumeric identifier of the order. Links back to the 'Order Status' report.
- **Invoice Address**
 - **Contact** – Individual responsible for invoices.
 - **Title** – Person's title, if applicable.
 - **Phone, Mobile, Fax**
 - **Address** – Address to which the invoice will be arriving, either electronically or by fax.
- **Shipping Address (if different from the 'Invoice Address')**
 - **Contact** – Name of the shipping contact person.
 - **Title** – Shipping person's title, if applicable.
 - **Phone, Mobile, Fax**
 - **Route** – Route on which the order will ship or has shipped.
 - **Ship Via** – Transportation method by which the order will be sent.
 - **Comments** – Any shipping comments that were included when the customer's shipping information was configured.

Purchasing Requirements

Some items are classified as 'purchased parts', meaning that they are not produced at the user's facility. The 'Purchasing Requirements' report details all information pertaining to those parts that should be evaluated as 'purchased'. This can be used to determine if all purchased parts have been purchased, as well as if/when they will be received; making it easier to estimate a completion date for the order.

This report can be accessed by selecting the Purchasing Requirements link on the 'Order Status' report.

Order Purchasing Requirements											
Order:		9145									
Item	Qty	Part	Size	PO Number	Vendor	PO Date	Expected Date	Received Date	Received Qty	Drop Ship	Work Cell
1	5	8660DH-SCRN-DOUBLE HUNG SCREEN	32 1/2 W X 27 3/8 H	00797	Screens Express	3/4/2020	3/4/2020			X	
1	5	IG-PURCH-	31 7/8 W X 27 1/4 H	PO00796	Clear View Glass	3/4/2020	3/4/2020	3/4/2020	5		
1	5	IG-PURCH-	30 7/8 W X 27 1/4 H	PO00796	Clear View Glass	3/4/2020	3/4/2020	3/4/2020	5		

The 'Purchasing Requirements' report contains the following information:

- **Order** – Order Number. Links to the 'Order Status' report.
- **Item** – Line item number for which the purchased part is needed.
- **Quantity** – Quantity of parts needed.
- **Part** – Part identifier.
- **Size** – Width, height, and thickness.
- **PO Number** – Number of the purchase order.
- **Vendor** – Name of the vendor.
- **PO Date** – Date the purchase order was created.
- **Expected Date** – Date the item(s) are expected at the facility.
- **Received Date** – Date the item(s) were received at the facility.
- **Received Qty** – Number of items that have been received.
- **Drop Ship** – Designates if the item will be sent directly from the vendor to the customer.
- **Work Cell** – If purchasing requirement is for a process that is being outsourced to a vendor (external work cell) this indicates the work cell from which the purchasing requirement originated.

Order Production Status

The 'Order Production Status' report gives the user an overview of the current status of each unit within an order. This is helpful when identifying the status of each unit on an order that must go through production to determine if an order is close to completion and will be able to ship on time.

Users can access the 'Order Production Status' report in the following ways:

1. In the 'Order Status' report, select the 'Production Status' link.
2. In the 'Schedule Orders' report, select the 'Order' number link.
3. In the 'Schedule Batch Details' report, select the 'Order-Item' link.
4. In the 'Incomplete Items' report, select the 'Sched-Unit' link.
5. In the 'Work Cell Item Details' report, select the 'Order-Item' link.
6. In the 'Opti Rack Details' report, select the 'Order-Item' link.
7. In the 'Related Orders' report, select the 'Schedule' link.
8. In FeneVision Trucking, select the F5 key.
9. In FeneVision Tracking, select the F1 key.
10. In FeneVision Core's 'Route Builder', right click and choose 'Production Status'.

Order Production Status

Order: 8708

Location	Schedule	Unit	Batch	Bin	Item/Order	Part	Station	Date Time	Status	Details	Plant Location	
MAIN	4734	1	1	1	1/1	8660DH-DOUBLE HUNG	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4734	2	1	2	1/2	8660DH-DOUBLE HUNG	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4734	3	1	3	1/3	8660DH-DOUBLE HUNG	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4734	4	1	4	1/4	8660DH-DOUBLE HUNG	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4734	5	1	5	1/5	8660DH-DOUBLE HUNG	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4734	6	1	6	3/6	8101SHFE-SINGLE HUNG FULL EYEBROW	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4734	7	1	7	3/7	8101SHFE-SINGLE HUNG FULL EYEBROW	FVCORE-0	3/14/2019 10:49:16 AM	Shipped		560	
		Containers: 560										
MAIN	4745	1	1	1	1/1	8000PW-PICTURE WINDOW		12/23/2019 9:26:23 AM	Rescheduled			
MAIN	4745	2	1	2	1/2	8000PW-PICTURE WINDOW		12/19/2019 4:16:38 PM	Released			
MAIN	4745	3	1	3	1/3	8000PW-PICTURE WINDOW		12/19/2019 4:16:38 PM	Released			
MAIN	4745	4	1	4	1/4	8000PW-PICTURE WINDOW		12/19/2019 4:16:38 PM	Released			
MAIN	4745	5	1	5	1/5	8000PW-PICTURE WINDOW		12/19/2019 4:59:08 PM	Rescheduled			
MAIN	4745	6	2		2	8100SH-SINGLE HUNG		12/23/2019 9:18:01 AM	Pulled Back	Size change		
MAIN	4745	7	2		2	8100SH-SINGLE HUNG		12/23/2019 9:18:01 AM	Pulled Back	Size change		
MAIN	4745	8	2		2	8100SH-SINGLE HUNG		12/23/2019 9:18:01 AM	Pulled Back	Size change		
MAIN	4746	1	1	1	1/1	8000PW-PICTURE WINDOW		12/19/2019 4:59:58 PM	Released			
MAIN	4750	1	1	1	1/2	8000PW-PICTURE WINDOW		12/23/2019 9:27:32 AM	Released			

The 'Order Production Status' report details the following information:

- **Order** – Alphanumeric identifier of the order. Hyperlinks to the 'Order Status' report.
- **Schedule** – Production schedule on which the unit was placed.
- **Unit** – Unit ID number. Selecting this link will access the 'Unit Bill of Materials' report.
- **Batch** – Identifies the schedule batch the unit belongs to.
- **Bin** – The 'Bin' is an incrementing number assigned to each unit to differentiate units within a batch. This often refers to a bin slot on a cart.
- **Item / Order** – Line item number to which the unit belongs.
- **Part** – Part number and description.
- **Station** – The station ID where the unit was last scanned, for example, 'Assembly' or 'Mulling'.
- **Date / Time** – The date and time of the unit's most recent scan.
- **Status** – Status of the unit. Each status hyperlinks to the 'Unit Details' report. Statuses include:
 - **Released** – The item has been released to production but not yet scanned at a station.
 - **Accepted** – The item has been accepted at a station.
 - **Complete** – The item has been scanned complete.
 - **Manually Loaded** – The item has been manually scanned onto a truck at Trucking. 'Manually Loaded' means the Trucking user loaded it using the keyboard rather than the barcode scanner.
 - **Loaded** – The item has been scanned onto a truck in Trucking. 'Loaded' means the Trucking user loaded it using the barcode scanner.
 - **Manually Unloaded** – The item has been manually unloaded from the truck in Trucking using the keyboard rather than the barcode scanner.
 - **Unloaded** – The item has been unloaded in Trucking using the barcode scanner.
 - **Rejected** – The item has been rejected.
 - **Reprocessing** – The item has been rejected and is being reprocessed.
 - **Rescheduled** – Item has been reprocessed and placed on a new schedule.
 - **Shipped** – The item has shipped.
 - **Manually Returned** – The item has been returned to the manufacturer. 'Manually Returned' means the Trucking operator used the keyboard, not the barcode scanner, when returning the item.

- **Returned** – The item has been returned to the manufacturer. ‘Returned’ means the Trucking operator used the barcode scanner when returning the item.
- **Pulled Back** – Item has been pulled back from Order Entry.

Note: Items that are to be rescheduled (‘Reject and Reprocess’ selected in FeneVision Tracking) can be reprocessed through the ‘Remakes’ dialog. Go to ‘Production’ >> ‘Remakes’.

- **Plant Location** – Identifies the plant location container.
- **Containers** – Identifies the containers the unit is in. If various subcomponents of the unit are in different production containers this will appear as a comma delimited list of container IDs and link to the ‘Containers’ report. If there is only one container it will link to the ‘Container Details’ report.

Order Containers

The ‘Order Containers’ report allows the user to check the status of an order with regard to the container to which it has been assigned. This is helpful when identifying which container(s) an order is on, where the container is currently located, the route it is on, and the status of the container.

This report can be accessed via the Container Status link in the ‘Order Status’ report.

Order Containers					
Order: 9145					
Shipping Container	Container Location	Route Name	Station	Date Time	Status
LW85		03/09/2020 CLE	FVCORE-0	3/3/2020 4:59:45 PM	Shipped

The ‘Order Containers’ report details the following information:

- **Order** – Alphanumeric identifier of the order. Links to the ‘Order Status’ report.
- **Shipping Container** – Name of the shipping container. Links to the ‘Container Details’ report.
- **Container Location** – Assigned location of container.
- **Route Name** – Name of the route on which the order / container has been placed.
- **Station** – Station from which the order / container was scanned.
- **Date Time** – Date and time the order / container was scanned.
- **Status** – Status of the container.
- **Released** – Order has been released to production and assigned a shipping container.
- **Shipped** – Order has shipped.

Container Details

The ‘Container Details’ report provides information regarding the contents of each container. This is can be used to determine what orders/line items are in a container and what slot they are in, as well as what customer(s) are associated with the container and the status of each unit in the container.

Users can access the ‘Container Details’ report in the following ways:

1. In the ‘Unit Details’ report select the ‘Container’ link.
2. In the ‘Order Production Status’ report select the ‘Containers’ link.
3. In the ‘Order Containers’ report, select the ‘Shipping Containers’ link.
4. In the ‘Containers’ report, select the ‘Container’ link.

Container Details

Container: CS1

Slot	Schedule	Unit	Customer	Order-Item	Part	Size	Station	Date Time	Status	Qty
1	5280	6	ABC Windows[10]	10884-1	8000PW - PICTURE WINDOW	3070	qa5uc	7/3/2023 10:54:16 AM	Shipped	1
2	5280	7	ABC Windows[10]	10884-1	8000PW - PICTURE WINDOW	3070	qa5uc	7/3/2023 10:54:16 AM	Shipped	1

The following information is available in the 'Containers Detail' report:

- **Container** – Name of the container.
- **Slot** – Slot number in which the ordered unit will be placed.
- **Schedule** – Schedule to which the unit belongs.
- **Unit** – Unit number.
- **Customer** – Customer name.
- **Order-Item** – Order number and item number. Links to the 'Order Status' report.
- **Part** – Alphanumeric identifier of the part.
- **Size** – Dimensions of the unit.
- **Station** – Last station through which the unit passed.
- **Date Time** – Date and time the container was last scanned.
- **Status** – Unit's status. Links to the 'Unit Details' report.
 - **Released** – The item has been released to production but not yet scanned at a station.
 - **Accepted** – The item has been accepted at a station.
 - **Complete** – The item has been scanned complete.
 - **Manually Loaded** – The item has been manually scanned onto a truck at Trucking. 'Manually Loaded' means the Trucking user loaded it using the keyboard rather than the barcode scanner.
 - **Loaded** – The item has been scanned onto a truck in Trucking. 'Loaded' means the Trucking user loaded it using the barcode scanner.
 - **Manually Unloaded** – The item has been manually unloaded from the truck in Trucking using the keyboard rather than the barcode scanner.
 - **Unloaded** – The item has been unloaded in Trucking using the barcode scanner.
 - **Rejected** – The item has been rejected.
 - **Reprocessing** – The item has been rejected and is being reprocessed.
 - **Rescheduled** – Item has been reprocessed and placed on a new schedule.
 - **Shipped** – The item has shipped.
 - **Manually Returned** – The item has been returned to the manufacturer. 'Manually Returned' means the Trucking operator used the keyboard, not the barcode scanner, when returning the item.
 - **Returned** – The item has been returned to the manufacturer. 'Returned' means the Trucking operator used the barcode scanner when returning the item.
- **Qty** – Amount of items represented by the record in the container. This field will be 1 for manufactured units, but may be greater than 1 for non-manufactured line items.

Related Orders

The 'Related Orders' report details all orders that are considered related. Related orders include the originating quote / order, any orders copied from the original order, and any orders copied from the copied order. It is also possible to manually assign relations in 'Order Entry'.

The 'Related Orders' report is accessed by selecting the 'Related Orders' link in the 'Order Production Status' report.

Related Orders

Order: [273629](#)

Order	Date	Target Ship Date	Route	Req Date	Type	PO Number	Customer Ref.	Schedule
273629	1/8/2015	1/12/2015	270671	1/14/2015	Order	183	105	13349-JRRRRR
273630	1/8/2015	1/12/2015	270671	1/14/2015	Order	184	63	13349-JRRRRR
273631	1/8/2015	1/12/2015	270671	1/14/2015	Order	185	52	13349-JRRRRR

The 'Related Orders' report contains the following information:

- **Order** – Alphanumeric identifier of the order. The 'Order' number at the top is the first order in the list of relations. The orders in the grid are the orders that have spawned from it. The link on the order numbers takes the user back to the 'Order Status' report.
- **Date** – Order date.
- **Target Ship Date** – Date the order is expected to ship.
- **Route** – Name of the route on which the order has been placed. Links to the 'Shipping History' report.
- **Req Date** - Date the order is required by the customer.
- **Type** – Type of order—quote, order, invoice only, credit, manufacturing, or forecast.
- **PO Number** – Purchase order number from order header in Order Entry.
- **Customer Ref** – Additional identifying information regarding the customer from order header in Order Entry., e.g., customer ID.
- **Schedule** – Identifier of schedule. Links to the 'Order Production Status' report.

Order Capacity Status

The Order Capacity Status' report shows the progress of the order as it is processed through the capacity work cells that were assigned to the line items. This is helpful in identifying where a product is through production to help estimate a completion date for the customer.

This report can be accessed through the Capacity Status link in the 'Order Status' report.

Item	Plan Date	Shift	Work Cell	Part	Size	Qty	Plan	Complete	Rescheduled	Remaining	Schedule	Station	Status
1	MAIN												
	3/3/2020	1	GLASS CUTTING	8660DH	36 W X 60 H X 3 1/4 T	5	15.0	15.0	0.0	0.0	4915	FVCORE-0	Shipped
	3/4/2020	1	FRAME CUTTING	8660DH	36 W X 60 H X 3 1/4 T	5	20.0	20.0	0.0	0.0	4915	FVCORE-0	Shipped
	3/4/2020	1	SASH CUTTING	8660DH	36 W X 60 H X 3 1/4 T	5	40.0	40.0	0.0	0.0	4915	FVCORE-0	Shipped
	3/5/2020	1	SASH WELDING	8660DH	36 W X 60 H X 3 1/4 T	5	10.0	10.0	0.0	0.0	4915	FVCORE-0	Shipped
	3/6/2020	1	FRAME WELDING	8660DH	36 W X 60 H X 3 1/4 T	5	5.0	5.0	0.0	0.0	4915	FVCORE-0	Shipped
	3/9/2020	1	GLAZING	8660DH	36 W X 60 H X 3 1/4 T	5	10.0	10.0	0.0	0.0	4915	FVCORE-0	Shipped
	3/9/2020	1	FINAL ASSEMBLY	8660DH	36 W X 60 H X 3 1/4 T	5	12.0	12.0	0.0	0.0	4915	FVCORE-0	Shipped

The 'Order Capacity Status' report contains the following information:

- **Order** – Alphanumeric identifier of the order. Links back to the 'Order Status' report.
- **Item** – Specifies the line item number of the part and is a link to the 'Line Item History' report.
- **Plan Date** – The date the part is planned to go through the assigned work cell.
- **Shift** – The shift when the part will be worked on at the assigned work cell.
- **Work Cell** – Work cell(s) through which the item will pass.
- **Part** – The item that is planned at the current work cell.
- **Size** – Dimensions of the item planned at the current work cell.
- **Qty** – Number of items from this line item planned at the current work cell.
- **Plan** – Number of items from this line item planned at the current work cell using the Per specified for the assigned work cell.
- **Complete** – Number of items from this line item that have been scanned accepted at the current work cell.

- **Rescheduled** – Number of items from the line item that have been rejected and rescheduled.
- **Remaining** – Number of items from this line item that have not yet been accepted at the current work cell.
- **Schedule** – The production schedule the line item was released on.
- **Station** – The most recent station that the current part was scanned at.
- **Status** – The most recent status that occurred during the most recent scan of the part at the current work cell.

Order Route Assignments

The 'Order Route Assignments' report displays the last route each item was on, along with the shipped and delivered quantities for those items.

The 'Order Route Assignments' report is accessed by selecting the 'Routes' link in the 'Order Production Status' report

Order Route Assignments							
Order: 9965							
Item	Part	Qty	Shipped Qty	Delivered Qty	Last Route	Ship Date	
1	8660DH - DOUBLE HUNG	5	5	0	02/07/2022	2/7/2022	Details
2	8000PW - PICTURE WINDOW	8	8	0	02/07/2022	2/7/2022	Details
3	8220SS-F - 2L SLIDER FRAME	4	4	0	02/07/2022	2/7/2022	Details

2/7/2022 1:13:06 PM 1 of 1

The 'Order Route Assignments' report contains the following information:

- **Order** – Alphanumeric identifier of the order. Links back to the 'Order Status' report.
- **Item** – Specifies the line item number of the part.
- **Part** – Alphanumeric identifier of the part.
- **Qty** – The number of units for that line item.
- **Shipped Qty** – The number of units that have shipped for that line item.
- **Delivered Qty** – The number of units that have been delivered for that line item.
- **Last Route** – The last route that line item was placed on. Links to the 'Route Orders' report.
- **Ship Date** – Actual date the items were shipped.
- **Details** – Links to the 'Shipping History' report for that line item.

Line Item Bill of Materials

The 'Line Item Bill of Materials' report is the only way to access the BOM results for past schedules released other than printing production reports. This is particularly useful when determining what subparts are in a BOM and any attributes associated with the parts after an order has been released to production.

The link for 'Item' on the 'Order Status' report takes the user to the 'Line Item Bill of Materials' report.

Line Item Bill of Materials			
Order-Item: 9145-1			
Part	Item Type	Qty	Size Attributes
8660DH-DOUBLE HUNG	Manufactured	1	36 W X 60 H X 3 1/4 T X
Sub Part	Item Type	Qty	Size Attributes
8660DH-F-DOUBLE HUNG FRAME	Manufactured	1	36 W X 60 H X
8660DH-KS-DOUBLE HUNG KEEPER SASH	Manufactured	1	32 5/16 W X 28 3/4 H X
8660DH-LS-DOUBLE HUNG LOCK SASH	Manufactured	1	33 5/16 W X 28 3/4 H X
8660DH-SCRN-DOUBLE HUNG SCREEN	Purchased	1	32 1/2 W X 27 3/8 H X

The following information is detailed in the 'Line Item Bill of Materials' report:

- **Order-Item** – Alphanumeric identifier of the order and line item number. Links to the 'Order Status' report.
- **Part** – Part identifier for the selected part. If the selected part is the orderable part, this will not be a link. If the selected part is a sub assembly then it will be a link that reloads the 'Line Item Bill of Materials' report for the part this sub assembly is under. Below is an example of this report for a sub assembly.

Line Item Bill of Materials			
Order-Item: 9145-1			
Part	Item Type	Qty	Size Attributes
..18660DH-F-DOUBLE HUNG FRAME	Manufactured	1	36 W X 60 H X
Sub Part	Item Type	Qty	Size Attributes
BALANCES-	Manufactured	1	
HDWR.WEEPCVRWH-WEEP COVER WHITE	Inventoried	1	
VA.WS-WEATHERSTRIPPING	Inventoried	1	
VA4027WH-SCREEN RETAINER SILL WHITE	Inventoried	1	
VA4673WH-SCREEN RETAINER WHITE	Inventoried	1	
VA4705WH-H-GLAZING BEAD HEIGHTS	Manufactured	1	36 H X
VA4705WH-W-GLAZING BEAD WIDTHS	Manufactured	1	36 W
VA4776WH-SILL ADAPTER WHITE	Inventoried	1	
VF9564WH-MEETING RAIL WHITE	Inventoried	1	
VF9861/3WH-W-SH HEAD / SILL WIDTHS	Manufactured	1	36 W
VF9863WH-H-JAMB HEIGHTS	Manufactured	1	60 H X

- **Sub Part** – The lower grid shows the sub parts of the selected part. If the sub part is a link, then it has its own sub parts. Selecting the link will load the ‘Line Item Bill of Materials’ for that part. If the sub part is not a link, then there are no parts beneath it in the BOM.
- **Item Type** – The part’s type.
 - **Manufactured** – Part is manufactured in-house. Component must be scheduled for manufacturing.
 - **Purchased** – Part is purchased from a vendor.
 - **Inventoried** – Part that is stocked. The use of this material is tracked.
 - **Serialized Inventory** – Part that is stocked and tracked by a unique serial number. This can be a part or a case that is full of some other part like a case of glass sheets.
 - **Surcharge** – Part used to represent surcharges on an order, e.g., ‘Energy Surcharge’.
- **Qty** – Number of individual parts making up the BOM.
- **Size** – Width / Height / Thickness
- **Attributes** – Link to take the user to the ‘Item Part Attributes’ report. This report shows all attributes on the selected part and their value for the particular part.

Item Part Attributes

The ‘Item Part Attributes’ report displays the attributes and their value for the line item. Like the ‘Line Item Bill of Materials’, this report is the only way to access the attributes for an item on a schedule already released to production other than printing production reports.

This report can be accessed via the X link under the attributes column in the ‘Line Item Bill of Materials’ report.

Item Part Attributes	
Attribute	Value
H	48
LITSEQ	1
SP-H	48
SP-W	36
SURF	0
T	0.25
TAG	AI
W	36

- **Attribute** – Displays the attributes assigned to the part. Only shows attributes that are released to production.
- **Value** – Displays each attribute’s value for this line item. This report shows the attribute value at the time of ‘Order Entry’. If the value changed during schedule release that change will not be seen here. See the ‘Part Attributes’ report for that value.

Item Price Breakdown

The 'Item Price Breakdown' report details the item's price and accompanying option prices. This can be helpful when determining individual item and option pricing for a customer.

Access the 'Item Price Breakdown' report by selecting the linked price located under the 'Price' column of the 'Order Status' report.

Item Price Breakdown		
Order-Item: 9145-1		
Part	Description	Price
8660DH	DOUBLE HUNG	\$311.30
Option	Description	Price
WH	WHITE	\$0.00
PUR	Purchased IG	\$0.00
LVR	LOUVER	\$0.00
FIBR	FIBERGLASS	\$0.00
EX	EXACT SIZE	\$0.00
HEADEX	HEAD EXPANDER	\$6.00
FS	FULL SCREEN	\$12.40
ARG	ARGON GAS	\$23.05
NF	NAIL FIN	\$48.00
Subtotal		\$400.75
Qty		5
Total		\$2,003.75

The 'Item Price Breakdown' report contains the following information separated into 'Part' and 'Option' categories:

- **Order-Item** – Alphanumeric identifier of the order and the line item number. Links to the 'Order Status' report.
- **Part** – Alphanumeric identifier of the part.
- **Description** – Description of the part.
- **Price** – Part price.
- **Option** – Alphanumeric description of the options selected for the part.
- **Description** – Description of the options selected for the part.
- **Price** – Option price.
- **Subtotal** – Total price for a single unit.
- **Qty** – Number of units for this line item.
- **Total** – Total price for the line item.

Order Notes


Order notes are entered at the time of 'Order Entry'. Additional notes can be entered in this dialog and the information will be saved. This is particularly useful for user's that don't have access to 'Order Entry'.

To access the 'Order Notes' dialog select the 'Order Notes' link at the bottom of the 'Order Status' report.

The 'Order Notes' screen contains the following information / fields:

- **Order Number** – Alphanumeric identifier of the order. Link returns to the 'Order Status' report.
- **Current Notes** – Existing notes that accompany the order.
- **Additional Notes** – Field for adding new notes to the order.

To add a note

1. Type message in the 'Additional Notes' field.
2. Select . The note will move into the 'Current Notes' field. These notes will then appear in the 'Order Status' report as well as 'Order Entry'.
3. To return to the 'Order Status' report, select the order number.

Unassigned Serialized Inventory

'Unassigned Serialized Inventory On Sales Order' displays all orders that contain a 'Serialized Inventory' part but have not been assigned a serial number. When an order is entered for a serialized part it is not required that the user select a serial number. However, a serial number must be assigned before the order can ship. This report shows the orders that need a serial number, and is sorted by 'Target Ship Date' to allow the user to determine when orders need to be addressed.

To access the 'Unassigned Serialized Inventory on Sales Order' report, go to 'Orders' >> 'Unassigned Serialized Inventory'.

Unassigned Serialized Inventory On Sales Order		
Location: {All}		
Target Ship Date	Order-Item	Part
2/15/2015	250751-3	HDS-4400 Bronze
	250750-7	SKS-3099 White
	250749-3	CCKJ-9877 Nickle
2/17/2015	250752-6	HDD-6456
	250753-7	SKS 3100 Bronze
2/19/2015	250754-2	HDS-4400 Bronze
	250788-25	SKS-3099 White
	251003-4	CCKJ-9877 Nickle

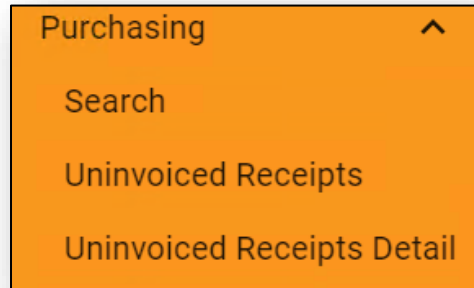
The report provides the following information:

- **Location** – Selected location as indicated by the 'Location' drop-down menu.

- **Target Ship Date** – Date the order is targeted to ship. This can be used as a deadline for when a serial number must be assigned.
- **Order-Item** – Alphanumeric identifier of the order and line item.
- **Part** – Part identifier.

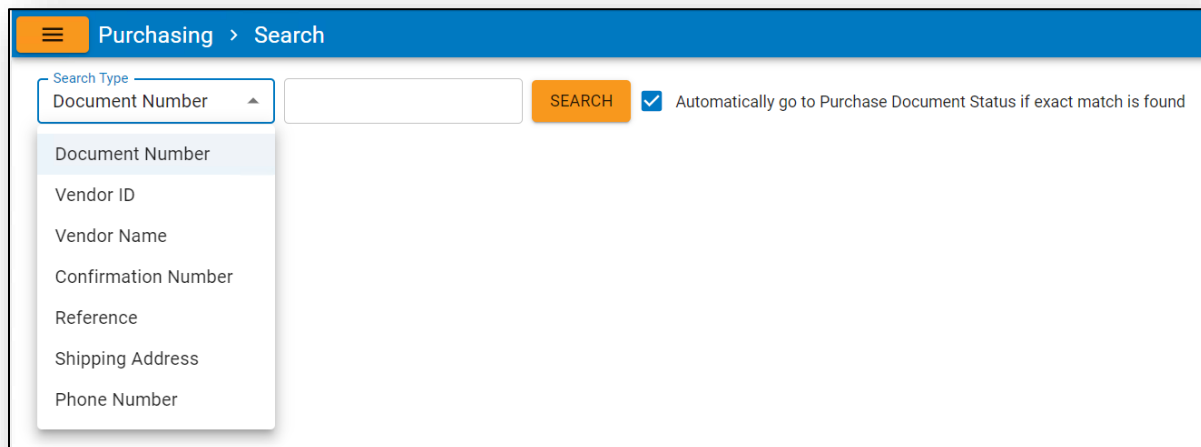
Purchasing

The 'Purchasing' tab contains access to purchasing documents, including purchase orders and receipts.



Search

The 'Purchase Order Search' screen behaves in the same manner as the 'Order Search' screen under the 'Orders' tab. Refer to the 'Search' screen under the 'Orders' section for more information on using this screen.



Once the user has completed the PO search, the 'Purchase Document Status' report will appear.

History

The 'Purchase History Document' report provides the user with a record of each purchasing document within a given date range. This report is helpful when looking to see the history of orders over a select period of time, specifically for an individual vendor. It defaults to a start date of 7 days prior to the current date, an end date of the current date, the location, type, and status set to all, and the vendor selected during the search.

The 'Purchase Document History' report can be accessed by searching for a specific vendor or vendor ID.

Start Date:	<input type="text" value="5/1/2023"/>	End Date:	<input type="text" value="9/26/2023"/>
Location:	{All}	Type:	{All}
Status:	{All}	Vendor:	Garrit's Super Supply House Plus

1	of 1	100%	Find Next
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Purchase Document History

Start Date: 5/1/2023 End Date: 9/26/2023 Type: {All} Location: {All}

Vendor: Garrit's Super Supply House Plus Status: {All}

Document	Type	Date	Exp Date	Status	Reference	Vendor	Qty	Received Qty	Invoiced Qty
ZZ103261	Purchase Order	7/21/2023	7/21/2023	Closed		Garrit's Super Supply House Plus	3.00	3.00	3.00
ZZ103257	Purchase Order	7/20/2023	7/20/2023	Available		Garrit's Super Supply House Plus	2.00	0.00	0.00
ZZ103253	Purchase Order	7/7/2023	7/7/2023	Available		Garrit's Super Supply House Plus	1.00	0.00	0.00

The 'Purchase Document History' report details the following information:

- **Document** – Alphanumeric identifier of the document. Links to the 'Purchase Document Status' report.
- **Type** – Type of document.
- **Purchase Order** – Used for purchased out items.
 - **Blanket** – A large reoccurring purchase order that will be delivered over the course of several months.
 - **Drop Ship** – Purchase order that will ship directly from the Vendor to the Customer.
 - **Return** – Return PO indicating a product is being sent back to the vendor.
 - **Credit** – Return PO in which the product is not physically being returned to the vendor, but a refund is needed.
 - **RFQ** – Customer request for quote.
- **Date** – Date the document was generated.
- **Exp Date** – Date the items are expected by.
- **Status** – Status of the document
 - **New** – The document was created but has not yet been approved.
 - **Approved** – The document has been approved but not yet released.
 - **Confirmed** – The vendor has been confirmed the document. This is done by entering a 'Confirmation Number'.
 - **Changed** – A change has been made to the document after it was released. 'Changed' documents must be 'Approved' and 'Released' again.
 - **Released** – The document has been released.
 - **Partially Received Orders** – A receipt has been created but only contains a portion of the order.
 - **Received** – All items on the document are on a receipt.
 - **Partially Invoiced Orders** – An invoice has been created but only contains a portion of the order.
 - **Closed** – The document is closed.
 - **Canceled** – The document has been canceled.
- **Reference** – Additional identifier for the vendor, e.g., facility location.
- **Vendor** – Vendor's name.
- **Qty** – Quantity on the document.
- **Received Qty** – Quantity received.
- **Invoiced Qty** – Quantity invoiced.

Purchase Document Status

The 'Purchase Document Status' report details information regarding a purchase order or a return purchase order. The red designation in the header of the 'Purchase Document Status' report indicates the document's status.

Users can access the report by selecting the PO number link on the 'Purchase History Document' report or by searching for the PO through the 'Purchase Order Search' screen.

Purchase Document Status

Closed

Document Number:	P000799	Date:	3/4/2020	Reference:	Order 8295	
Type:	Purchase Order	Required Date:	3/4/2020	Terms:	Net 30 Days	
Vendor:	KD Vendor	Expected Date:	3/4/2020	F.O.B.:	Buyer	
Confirmation Number:	3569	Release Status:	PO Released. No action taken.			
Address		Related Documents		Receipts		
Item	Qty	Part	UOM	Size	Price	Total
1	1	IG-PURCH		35 7/8 W X 37 1/4 H	\$25.05	\$25.05
REQ: 03/04/2020 - 1						
2	1	IG-PURCH		34 7/8 W X 37 1/4 H	\$24.35	\$24.35
REQ: 03/04/2020 - 1						
Totals:		2			SUBTOTAL:	\$49.40
					TOTAL:	\$49.40
Purchase Document Notes: 5% COD						

The 'Purchase Document Status' report contains the following fields:

- **Document Number** – Alphanumeric identifier of the document.
- **Type** – Type of document, either 'Purchase Order', 'Blanket', 'Drop Ship', 'Return', 'Credit', or 'RFQ'.
- **Vendor** – Name of the vendor from which the products will be ordered.
- **Confirmation Number** – Once the purchase order is sent to the vendor, the vendor sends back a confirmation number that can be manually entered in this field (in 'PO Entry' or 'RPO Entry'). Once entered, the status of the document becomes 'Confirmed'.
- **Date** – Date the document was entered.
- **Required Date** – Date by which the order is required to meet production plans.
- **Expected Date** – The expected date is the date that the material is expected for delivery from the supplier.
- **Release Status** – Indicates status of the purchase document.
- **Reference** – Additional identifying terms for the document.
- **Terms** – Drop-down to indicate the terms for payment on the order.
- **F.O.B.** – 'Free on Board' designation that specifies the terms of sale under which the title of goods become the property of the buyer. It also designates the party responsible for the payment of the shipping costs—in this case, it could be the buyer, it could be an "in house" payment, or the seller could pay the shipping.
- **Address** – Where the document will be delivered. Links to the 'Addresses' report.
- **Related Documents** – Link to the 'Related Documents' report that shows any additional documents associated with this purchase document.
- **Receipts** – Links to the 'Receipts' report to show what receipts exist against this document.
- **Item** – Line item number.
- **Qty** – Quantity of this item the order.
- **Part** – Detailed description of the part.
- **UOM** – Unit of measure.
- **Size** – Dimensions of the part.
- **Price** – Price per item.
- **Total** – Total price of the line item. Links to the 'Item Price Breakdown'
- **Subtotal** – Total price without tax or surcharges.
- **State Tax %** – Amount of tax applied to order.
- **Total** – Total price of the order.
- **Purchase Document Notes** – Any notes associated with this purchase document. Links to the 'Purchase Order Notes' dialog.

Purchase Document Addresses

The 'Addresses' report details the address and contact information for where the document's items will be delivered.

The 'Addresses' report is accessed from the 'Address' link in the 'Purchase Document Status' report.

Addresses

Document Number: [POD55062](#)

Address

Contact: John Smith
Phone: 317.555.5555
Fax: 317.555.5554
Address: Worldwide Glass
2015 Admirals Lane
Indianapolis, IN 46236

Ship Via: Truck
Comment: Shipping documents must accompany delivery.

The 'Addresses' report provides the following information:

- **Document Number** – Alphanumeric identifier of the document. Links to the 'Purchase Document Status' report.
- **Address**
 - **Contact** – Individual the vendor can contact regarding the document.
 - **Phone, Mobile, Fax**
 - **Address** – Address where the document's items will be sent.
 - **Ship Via** – Transportation method by which the document's items will be sent.
 - **Comment** – Any comments regarding the document.

Related Purchasing Documents

The 'Related Documents' shows all documents related to the selected document. This is particularly useful when an RPO is created to return an item from a PO and a new PO is generated from the RPO. Accessing the 'Related Documents' report for either PO or the RPO would show all three documents.

'Related Documents' is accessed by selecting the 'Related Documents' link in the 'Purchase Document Status' report.

Related Documents					
Document Number: POD55062					
Document Number	Type	Date	Required Date	Expected Date	Reference
po5068	Purchase Order	11/12/2013	11/12/2013	11/12/2013	
po5616	Purchase Order	8/19/2014	8/19/2014	8/19/2014	
POD55050	Drop Ship	8/30/2013	8/30/2013	8/30/2013	
POD55062	Drop Ship	11/12/2013	11/12/2013	11/12/2013	

The following fields exist in the 'Related Documents' report:

- **Document Number** – Purchase document identifier. Links to the 'Purchase Document Status' report.
- **Type** – Type of purchase document, e.g., PO, blanket, drop ship, credit, or return PO (RPO).
- **Date** – Date the document was generated.
- **Required Date** – Date by which the purchase order must be filled.
- **Expected Date** – Date the document's items are expected to be received.
- **Reference** – Additional identifying information regarding the document.

Receipts

The 'Receipts' report shows all receipts that exist against the selected document. This is helpful in determining the status of a receipt, as well as the date and quantity of items on the receipt.

Users can access the 'Receipts' report in the following ways:

1. In the 'Purchase Document Status' report, select the 'Receipts' link.
2. In the 'Uninvoiced Receipts' report, select the 'Receipts' link.

Receipts					
Document Number: MNBS726					
Receipt	Status	Vendor	Date	Received Qty	Reference
RC5726	Posted	GC Supply, Inc. - 1	1/21/2015	3	
RC5726-1	Changed	GC Supply, Inc. - 1	1/21/2015	5	

The following information is available in the 'Receipts' report:

- **Document Number** – Purchase document identifier. Links to the 'Purchase Document Status' report.
- **Receipt** – Alphanumeric identifier of the receipt.
- **Status** – Status of the receipt, e.g., posted, closed, cancelled,
- **Vendor** – Name of the vendor and vendor ID.
- **Date** – Date the receipt was entered.
- **Received Qty** – Quantity of items received.
- **Reference** – Additional identifying information related to the vendor.

Purchased Item Price Breakdown

The 'Item Price Breakdown' report details the item's price and accompanying option prices. This is particularly helpful to view how the total price of the purchased item is calculated.

The 'Item Price Breakdown' report is accessed by selecting the 'Total' price link in the 'Purchase Document Status' report.

Item Price Breakdown		
Document-Item: po5373-1		
Part	Description	Price
S14CLSN62H096130	1/4 SN-62 HT LOWE SS 96 X 130	\$170.28
	Subtotal	\$170.28
	Qty	10
	Total	\$1,702.82

The following information is available in the 'Item Price Breakdown' report:

- **Document-Item** – Document identifier and item number. Links to the 'Purchase Document Status' report.
- **Part** – Alphanumeric identifier of the purchased part.
- **Description** – Detailed description of the purchased part.
- **Price** – The unit price of the purchased part.
- **Subtotal** – Total price for a single unit.
- **Qty** – Number of units ordered.
- **Total** – Total price for the document.

Purchase Document Notes

The 'Purchase Document Notes' screen behaves just as the 'Order Notes' screen. See 'Order Notes' for more information on how to use this dialog.

The 'Document Number' links back to the 'Purchase Document Status' report.

Uninvoiced Receipts

The 'Uninvoiced Receipts' report details all receipts that have not been invoiced. This report will show the vendor, date, and PO number for each receipt not yet invoiced. This report is a helpful way to audit the receipts that have yet to be invoiced. By default, the report displays all vendors and all location with a start date of the 60 days prior to the current date and an end date of the current date.

To access the 'Uninvoiced Receipts' report, go to 'Purchasing' >> 'Uninvoiced Receipts'.

Receipt	Date	Vendor	PO Number	Reference
RC103178	6/7/2023	Garrit's Super Supply House Plus	ZZ103178	
RC103179	6/7/2023	Garrit's Super Supply House Plus	ZZ103179	ZZ103179
RC103180	6/8/2023	Design Zone Glass LLC	ZZ103180	
RC103181	6/8/2023	Design Zone Glass LLC	ZZ103181	
RPO00458	6/9/2023	Garrit's Super Supply House Plus	RP000458	

The 'Uninvoiced Receipts' report details the following information:

- **Receipt** – Alphanumeric identifier of the receipt. Links to the 'Receipts' report.
- **Date** – Date receipt was issued.
- **Vendor** – Name of the vendor.
- **PO Number** – Purchase order number. Links to 'Purchase Document Status' report.
- **Reference** – Additional identifier for the vendor, e.g., facility location.

Uninvoiced Receipts Detail

The 'Uninvoiced Receipts Detail' report details the part, pricing, and quantity information of all receipts that have not been invoiced. This report is a helpful way to audit the receipts that have yet to be invoiced while also providing a snapshot of each receipt part prices and totals. By default, the report displays all vendors and all location with a start date of the 60 days prior to the current date and an end date of the current date.

To access the 'Uninvoiced Receipts Detail' report, go to 'Purchasing' >> 'Uninvoiced Receipts Detail'.

Receipt	Date	PO Number	Vendor	Reference	Item	Part	Qty	Unit Price	Total
RC103178	6/7/2023	ZZ103178	Garrit's Super Supply House Plus		1	PL-G10 case	10.00	\$2,000.00	\$20,000.00
							Subtotal	10.00	\$20,000.00
RC103179	6/7/2023	ZZ103179	Garrit's Super Supply House Plus	ZZ103179	1	PL-G10 case	1.00	\$2,000.00	\$2,000.00
							Subtotal	1.00	\$2,000.00
RC103180	6/8/2023	ZZ103180	Design Zone Glass LLC		2		3.00	\$5.00	\$15.00
							Subtotal	3.00	\$15.00
RC103181	6/8/2023	ZZ103181	Design Zone Glass LLC		1		3.00	\$5.00	\$15.00
							Subtotal	3.00	\$15.00
							Total		\$22,030.00

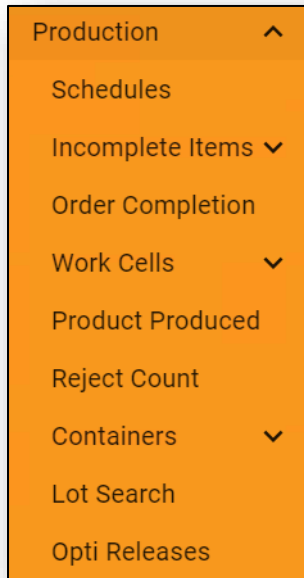
The 'Uninvoiced Receipts Detail' report details the following information:

- **Receipt** – Alphanumeric identifier of the receipt. Links to the 'Receipts' report.
- **Date** – Date receipt was issued.
- **PO Number** – Purchase order number.
- **Vendor** – Name of the vendor.
- **Reference** – Additional identifier for the vendor, e.g., facility location.
- **Item** – Purchase order line item number.
- **Part** – Vendor part description.
- **Qty** – Unit quantity on the receipt.
- **Unit Price** – Price assigned to the unit on the receipt.
- **Total** – Total price of the unit on the receipt.
- **Subtotal** – Total price of the receipt.

Note: This report will always show in the default 'Purchasing UOM', even if received in a different UOM.

Production

The 'Production' menu provides information on each aspect of the manufacturing process.



Schedules

The 'Schedules' reports provides detailed information on each schedule created, including the total, complete, and backorder quantities. This report is helpful to view production that has been released, and how much of that production has been completed, over a certain date range. This report defaults to generate for the last 14 days from the current date.

To access the 'Schedules' report, go to 'Production' >> 'Schedules'.

Schedules											
Start Date:		5/1/2019	End Date:		5/14/2019	Location:					MAIN
Location	Release Date	Schedule	Description	Qty	Complete Qty	Rejected Qty	Rescheduled Qty	Batch	Inventory		
MAIN	5/14/2019	27242	KD0514-2	1	1	0	0	Detail	Released		
MAIN	5/14/2019	27241	KD0514-1	100	100	0	0	Detail	Released		
MAIN	5/13/2019	27240	KD0513-1	1000	1000	0	0	Detail	Released		
MAIN	5/13/2019	27239	JS DH 5/13	12	4	0	0	Detail	Released		
MAIN	5/10/2019	27238	KD0510-1	1000	1000	0	0	Detail	Released		
MAIN	5/3/2019	27237	KD0503-1	3	1	1	1	Detail	Released		
MAIN	5/1/2019	27236	JS DH 5/1 2	20	5	0	0	Detail	Released		
MAIN	5/1/2019	27235	JS DH 5/1	5	5	0	0	Detail	Released		

The 'Schedules' report provides the following information:

- **Release Date** – Date the schedule was released to production.
- **ID** – Schedule number. Link takes the user to the 'Schedule Orders' report.
- **Description** – Description of the schedule.
- **Qty** – Number of items scheduled to be produced.
- **Complete Qty** – Number of scheduled items that are complete. Shows green when all items from the schedule are either complete or rescheduled.
- **Rejected Qty** - Number of scheduled items that were rejected but have not been rescheduled. Shows orange when the rejected quantity is greater than zero (0). When the quantity is greater than zero (0) selecting the field will open the 'Schedule Reject Details' report.
- **Rescheduled Qty** – Number of scheduled items that were rejected and rescheduled through the Remakes screen. Shows yellow when the rescheduled quantity is greater than zero (0).
- **Batch** – The 'Detail' link takes the user to the 'Schedule Batches' report.
- **Inventory** – Indicates the inventory status of the schedule, either 'Released', 'Allocated', or 'Relieved'. Only applicable if 'Real-Time Inventory' is disabled.

Schedule Orders

The 'Schedule Orders' report displays information regarding the individual orders on a schedule. This report displays the orders that have been released, and how much of that production has been completed, for a specific schedule.

Users can access the 'Schedule Orders' report in the following ways:

1. In the 'Schedules' report, select the 'ID' link.
2. In the 'Opti Release Racks' report, select the 'Schedule' link.
3. In the 'Opti Rack Details' report, select the 'Schedule' link.

Schedule Orders						
Schedule:	27237-KD0503-1					
Location:	MAIN					
Release Date:	5/3/2019					
Order	PO Number	Customer	Qty	Complete Qty	Rejected Qty	Rescheduled Qty
895325		KD Glass	3	1	1	1
Totals			3	1	1	1

The 'Schedule Orders' report details the following information:

- **Order Number** – Alphanumeric identifier of the order. Links to the 'Order Production Status' report.
- **PO Number** – Purchase order number.
- **Customer** – Customer name.
- **Qty** – Number of items from that order scheduled to be produced on this schedule.
- **Complete Qty** – Number of items from that order on the schedule that are complete. Shows green when all items from the schedule are either complete or rescheduled.
- **Rejected Qty** – Number of scheduled items that were rejected but have not been rescheduled. Shows orange when the rejected quantity is greater than zero (0).
- **Rescheduled Qty** – Number of scheduled items that were rejected and rescheduled through the Remakes screen. Shows yellow when the rescheduled quantity is greater than zero (0).

Schedule Batches

The 'Schedule Batches' report gives users detailed information regarding each batch contained within a particular schedule. This report displays the batches that are part of the specific schedule and how much of that production has been completed.

The 'Schedule Batches' report is accessed by selecting the 'Detail' link in the 'Batch' column of the 'Schedules' report.

Schedule Batches						
Schedule:	27245-KD0517-2					
Location:	MAIN					
Release Date:	5/17/2019					
Batch	Description	Qty	Complete Qty	Rejected Qty	Rescheduled Qty	
1	STND 1	4	2	1	1	
4	STND 4	3	2	0	1	
5	STND 5	2	0	1	0	
Totals		9	4	2	2	

The 'Schedule Batches' report details the following information:

- **Schedule** – Schedule number and description of the schedule selected.
- **Batch ID** – Batch number contained within that schedule. Link takes the user to the 'Schedule Batch Detail' report.

- **Description** – A description of the batch.
- **Qty** – Number of items from that batch scheduled to be produced.
- **Complete Qty** – Number of items from that batch that are complete. Shows green when all items from the schedule are either complete or rescheduled.
- **Rejected Qty** – Number of scheduled items that were rejected but have not been rescheduled. Shows orange when the rejected quantity is greater than zero (0). When the quantity is greater than zero (0) selecting the field will open the 'Schedule Reject Details' report.
- **Rescheduled Qty** – Number of scheduled items that were rejected and rescheduled through the Remakes screen. Shows yellow when the rescheduled quantity is greater than zero (0).

Schedule Batch Detail

The 'Schedule Batch Detail' report describes each order-item within a selected batch. This helps to identify where each item is through the production process for a specific schedule and batch; including what station and time an item was last scanned at, the status of an item, and if the item had been containerized.

The 'Schedule Batch Detail' report is accessed by selecting the 'Batch ID' link from the 'Schedule Batches' report.

Schedule Batch Details								
Schedule:		27245-KD0517-2						
Batch:		1-Sun/Verde DH						
Location:		MAIN						
Release Date:		5/17/2019						
Unit	Bin	Order-Item	Part	Station	Date Time	Status	Details	Container
1	1	895359-2	CPI2 QA - Casement Picture	CORE	5/17/2019 11:14:57 AM	Rescheduled		
2	2	895359-2	CPI2 QA - Casement Picture	Wrap	5/17/2019 11:12:43 AM	Rejected	BACKORDER FRAME	
3	3	895359-2	CPI2 QA - Casement Picture	Wrap	5/17/2019 11:12:53 AM	Complete		
4	4	895359-2	CPI2 QA - Casement Picture	Wrap	5/17/2019 11:13:02 AM	Complete		

The 'Schedule Batch Detail' report contains the following information:

- **Schedule** – Identifier of the schedule.
- **Batch** – Batch number – Batch description.
- **Unit** – Unit number. Links to the 'Unit Bill of Materials' report.
- **Bin** – The 'Bin' is an incrementing number assigned to each unit to differentiate units within a batch. This often refers to a bin slot on a cart.
- **Order-Item** – Alphanumeric identifier of the order and number of the line item. Links to the 'Order Production Status' report.
- **Part** – Alphanumeric identifier and description of the part.
- **Station** – Station from which the most recent scan occurred for the unit.
- **Date / Time** – Date and time the most recent scan occurred for the unit.
- **Status** – Status of the unit. Links to the 'Unit Bill of Materials' report.
 - **Released** – The item has been released to production but not yet scanned at a station.
 - **Accepted** – The item has been accepted at a station.
 - **Complete** – The item has been scanned complete.
 - **Manually Loaded** – The item has been manually scanned onto a truck at Trucking. 'Manually Loaded' means the Trucking user loaded it using the keyboard rather than the barcode scanner.
 - **Loaded** – The item has been scanned onto a truck in Trucking. 'Loaded' means the Trucking user loaded it using the barcode scanner.
 - **Manually Unloaded** – The item has been manually unloaded from the truck in Trucking using the keyboard rather than the barcode scanner.
 - **Unloaded** – The item has been unloaded in Trucking using the barcode scanner.
 - **Rejected** – The item has been rejected.
 - **Reprocessing** – The item has been rejected and is being reprocessed.
 - **Rescheduled** – Item has been reprocessed and placed on a new schedule.

- **Shipped** – The item has shipped.
 - **Manually Returned** – The item has been returned to the manufacturer. ‘Manually Returned’ means the Trucking operator used the keyboard, not the barcode scanner, when returning the item.
 - **Returned** – The item has been returned to the manufacturer. ‘Returned’ means the Trucking operator used the barcode scanner when returning the item.
- **Details** – Any details related to the batch.
 - **Container** – Identifier of the container to which the unit was assigned.

Unit Bill of Materials

The ‘Unit Bill of Materials’ report details the bill of materials for a specific line item. This is particularly useful when determining what subparts are on a BOM and any attributes associated with the parts after an order has been released to production. This report is the only way to access the BOM results for a released schedule other than printing production reports.

Users can access the ‘Unit Bill of Materials’ report in the following ways:

1. In the ‘Order Production Status’ report, select the ‘Unit’ link.
2. In the ‘Unit Bill of Materials’ report, select a ‘Part’ or ‘Subpart’ link.
3. In the ‘Schedule Batch Details’ report, select the ‘Unit’ link.

Unit Bill of Materials						
Order-Item:	9143-1					
Schedule:	4913-KD0220-1					
Batch:	1-LINE1					
Bin:	1					
Unit:	1					
Part	Item Type	Qty	Size	Glass ID	Secondary Bin	Attributes
8660DH-DOUBLE HUNG	Manufactured	1	36 W X 60 H X 3 1/4 T			X
Sub Part	Item Type	Qty	Size	Glass ID	Secondary Bin	Attributes
8660DH-F-DOUBLE HUNG FRAME	Manufactured	1	36 W X 60 H			X
8660DH-KS-DOUBLE HUNG KEEPER_SASH	Manufactured	1	32 5/16 W X 28 3/4 H			X
8660DH-LS-DOUBLE HUNG LOCK_SASH	Manufactured	1	33 5/16 W X 28 3/4 H			X

The following fields exist in the ‘Unit Bill of Materials’ report:

- **Order-Item** – Alphanumeric identifier of the order and the line item. Links to the ‘Order Status’ report.
- **Schedule** – Identifier of the schedule.
- **Batch** – Batch number.
- **Bin** – The ‘Bin’ is an incrementing number assigned to each unit to differentiate units within a batch. This often refers to a bin slot on a cart.
- **Unit** – Unit number.
- **Part / Sub Part** – Alphanumeric identifier of the part / sub part. Links to the ‘Unit Bill of Materials’ report for that particular part / sub part.
- **Item Type** – Item type of the part.
 - **Manufactured** – Part is manufactured in-house. Component must be scheduled for manufacturing.
 - **Purchased** – Part is purchased from a vendor.
 - **Inventoried** – Part that is stocked. The use of this material is tracked.
 - **Serialized Inventory** – Part that is stocked and tracked by a unique serial number. This can be a part or a case that is full of some other part like a case of glass sheets.
 - **Surcharge** – Part used to represent surcharges on an order, e.g., ‘Energy Surcharge’.
- **Qty** – Number of items in that subset of the BOM.
- **Size** – Dimensions of the item.
- **Glass ID** – Available field for customization.
- **Secondary Bin** – The bin that is assigned when a subcomponent is identified as a shipped item.
- **Attributes** – Link to the ‘Part Attributes’ report.

Part Attributes

The 'Part Attributes' report shows the attributes and their values for the unit. This report is helpful when troubleshooting attribute values after a schedule has been released to production. Like the 'Unit Bill of Materials', this report is the only way to access the attributes for an item on a schedule already released to production other than printing production reports.

This report can be accessed via the X link under the attributes column in the 'Unit Bill of Materials' report.

Part Attributes	
Schedule:	4913
Unit:	1
Part:	8660DH-DOUBLE HUNG
Attribute	Value
H	60
NFRCAL	1
NFRCPCD	1
NFRCINCAL	1
NFRCSHG	1
NFRCUF	1
NFRCVT	1
SPACE	1.11
T	3.25
WGHT	53.389

- **Schedule** – Schedule number.
- **Unit** – Unit number.
- **Part** – Alphanumeric identifier of the part.
- **Attribute** – Displays the attributes assigned to the part. Only shows attributes that are released to production.
- **Value** – Displays each attribute's value for this unit. This report shows the attribute value at the time of schedule release. If the value changed from when the order was entered that change will be seen here. See the 'Item Part Attributes' report for the value at the time of 'Order Entry'.

Unit Details

The 'Unit Details' report provides detailed status information and detailed history regarding each unit. This useful when trying to find all status changes, and current status, of an item and its subparts. Along with the date/time, status, and station of a unit, this report will also show a history of the units that include each scan made and any capacity alerts that were approved.

Users can access the 'Unit Details' report in the following ways:

1. In the 'Order Production Status' report, select the 'Status' link.
2. In the 'Opti Rack Details' report, select the 'Unit' link.
3. In the 'Container Details' report, select the 'Status' link.
4. In the 'Schedule Batch Details' report, select the 'Status' link.
5. In the 'Incomplete Items' report, select the 'Status' link.
6. In the 'Work Cell Item Details' report, select the 'Status' link.

Unit Details									
Order-Item:	9143-1								
Schedule:	4913-KD0220-1								
Batch:	1-LINE1								
Bin:	1								
Unit:	1								
Status									
Part	Size	Station	Date Time	Status	Details	Lot Number			
8660DH - DOUBLE HUNG	36 W X 60 H X 3 1/4 T	Trucking	2/20/2020 10:01:00 AM	Shipped					
8660DH-F - DOUBLE HUNG FRAME	36 W X 60 H	Trucking	2/20/2020 10:01:00 AM	Shipped					
BALANCES		Trucking	2/20/2020 10:01:00 AM	Shipped					
BAL.26C - 26C Balance Assembly		Trucking	2/20/2020 10:01:00 AM	Shipped					
HDWR.WEPC/RWH - WEEP COVER WHITE		Trucking	2/20/2020 10:01:00 AM	Shipped					
VA.WS - WEATHERSTRIPPING		Trucking	2/20/2020 10:01:00 AM	Shipped					
VA4027WH - SCREEN RETAINER SILL WHITE		Trucking	2/20/2020 10:01:00 AM	Shipped					
VA4673WH - SCREEN RETAINER WHITE		Trucking	2/20/2020 10:01:00 AM	Shipped					
VA4705WH-H - GLAZING BEAD HEIGHTS	36 H	Trucking	2/20/2020 10:01:00 AM	Shipped					
VA4705WH - GLAZING BEAD 7/8 WHITE	36 H	Trucking	2/20/2020 10:01:00 AM	Shipped					
VA4705WH-W - GLAZING BEAD WIDTHS	36 W	Trucking	2/20/2020 10:01:00 AM	Shipped					
History									
Part	Size	Station	Date Time	Status	Details	Employee	Container	Lot Number	
8660DH - DOUBLE HUNG	36 W X 60 H	Trucking	2/20/2020 10:01:07 AM	Manually Loaded		Fenotech Admin			
8660DH - DOUBLE HUNG	36 W X 60 H	Trucking	2/20/2020 10:01:00 AM	Shipped		Fenotech Admin			
8660DH - DOUBLE HUNG	36 W X 60 H	Trucking	2/20/2020 9:59:24 AM	Complete					
8660DH - DOUBLE HUNG	36 W X 60 H	Trucking	2/20/2020 9:59:23 AM	Accepted					
Alert Approved By Fenotech Admin		8660DH - DOUBLE HUNG - GLASS CUTTING, FRAME CUTTING, FRAME WELDING							

The following information can be found in the 'Unit Details' report:

- **Order-Item** – Identifier of the order and line item. Links to the 'Order Status' report.
- **Schedule** – Identifier of the schedule.
- **Batch** – Batch number - description (from 'Production Scheduling').
- **Bin** – The 'Bin' is an incrementing number assigned to each unit to differentiate units within a batch. This often refers to a bin slot on a cart.
- **Unit** – Unit number.
 - **Status** – Details regarding the current status of the unit including:
 - **Part** – Alphanumeric identifier and description of every part that makes up the BOM.
 - **Size** – Dimensions (width, height, thickness).
 - **Station** – Last station through which the item passed.
 - **Date Time** – Date and time the item passed through the station.
 - **Status** – Each part's current status.
 - **Released** – The item has been released to production but not yet scanned at a station.
 - **Accepted** – The item has been accepted at a station.
 - **Complete** – The item has been scanned complete.
 - **Manually Loaded** – The item has been manually scanned onto a truck at Trucking. 'Manually Loaded' means the Trucking user loaded it using the keyboard rather than the barcode scanner.
 - **Loaded** – The item has been scanned onto a truck in Trucking. 'Loaded' means the Trucking user loaded it using the barcode scanner.
 - **Manually Unloaded** – The item has been manually unloaded from the truck in Trucking using the keyboard rather than the barcode scanner.
 - **Unloaded** – The item has been unloaded in Trucking using the barcode scanner.
 - **Rejected** – The item has been rejected.
 - **Reprocessing** – The item has been rejected and is being reprocessed.
 - **Rescheduled** – Item has been reprocessed and placed on a new schedule.
 - **Shipped** – The item has shipped.
 - **Manually Returned** – The item has been returned to the manufacturer. 'Manually Returned' means the Trucking operator used the keyboard, not the barcode scanner, when returning the item.
 - **Returned** – The item has been returned to the manufacturer. 'Returned' means the Trucking operator used the barcode scanner when returning the item.

- **Removed** – Item has been removed from a container. This status only shows up in the Unit History of the part and does not affect the item’s completed or accepted status.
- **Pulled Back** – Item has been pulled back from Order Entry. This status is only visible in the Unit History of the part and the status section of the report will be empty when the item has been pulled back.

- **Details** – Provides additional information.

For example, if a part is rejected this shows the ‘Reject Reason’ and ‘Reject Comment’. For glass parts, this shows what release the glass part is on in Opti-Glass.

- **Rack-Slot** – The rack identifier and slot number where the item was placed. Links to the ‘Opti Rack Details’ report.
- **Lot Number** – Lot number of the part if ‘Lot Tracking has been enabled for the part. Links to the ‘Lot Number Search’ report.

- **History** – Details the unit’s scan history.

- **Part** – Alphanumeric identifier of the part.

Note: BOM part history will look two levels up in the BOM for subassembly parts.

- **Size** – Part’s dimensions, including width, height, and thickness.
- **Station** – Tracking station at which the scan occurred.
- **Date Time** – Date and time of that scan.
- **Status** – Status given to the part at that station.
- **Details** – Provides additional information. For example, if a part is rejected this shows the ‘Reject Reason’ and ‘Reject Comment’.
- **Employee** – Employee responsible for the scan.
- **Container** – Container ID into which the part was placed. Links to the ‘Container Details’ report. Link is only enabled if item is still in that container. When a unit is rejected while on a container the container field will show the container with a line through the text to indicate that the item was removed from the container.
- **Lot Number** – Lot number from which the part was produced. Only applicable for ‘Lot Tracked’ parts. Links to the ‘Lot Number Search’ report for that lot.

When units are processed through capacity plan alerts, the following information will display:

- **Alert Approved By** – Employee that entered credentials to process the parts through the plan alert.
- **Part(s)** – Alphanumeric identifier of the part(s) as well as the work cells in the capacity plan that were skipped.

History								
Part	Size	Station	Date Time	Status	Details	Employee	Container	Lot Number
ARCH-IG - Architectural IG	25W X 23H X 1T	WC-SEALER	10/7/2016 11:02:31 AM	Accepted			SHIPBOX3	
Alert Approved By Fenotech Admin		<ul style="list-style-type: none"> • ARCH-IG - Architectural IG - WC-ASSEMBLER • GL-040-CLR - 4mm Clear - FAB-PROCESS1, FAB-PROCESS2, WC-CUTTER, WC-FABBER, WC-PAINTER, WC-TEMPER • GL-040-CLR - 4mm Clear - FAB-PROCESS1, FAB-PROCESS2, WC-CUTTER, WC-FABBER, WC-PAINTER, WC-TEMPER 						

Schedule Reject Details

The ‘Schedule Reject Details’ report provides additional information about the rejected units from a schedule. This report can be accessed by selecting the link in the Rejected Qty field from the ‘Schedules’ report, as well as from selecting the link in the Rejected Qty field from the ‘Schedule Batches’ report.

Schedule Reject Details

Schedule: 101-555 test
Batch: 1-Batch Description
Location: MAIN
Release Date: 12/13/2021

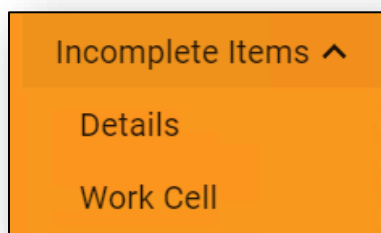
Batch	Unit	Bin	Order-Item	Part	Station	Date Time	Status	Details	Plant Location
1	1	1	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 8:55:14 AM	Reprocessing	BROKE IN MACHINE Stuck in machine	
1	2	2	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 9:00:00 AM	Reprocessing	CUT WRONG Bad cut	
1	3	3	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 8:58:47 AM	Reprocessing	BROKE ON TRUCK Dropped	INST-H1
1	4	4	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 9:03:30 AM	Reprocessing	DID NOT ADD EDGEWORK No edgework	INST-H1
1	5	5	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 9:05:04 AM	Rejected	BROKE HANDLING Dropped	INST-H1
1	6	6	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 9:05:56 AM	Reprocessing	BROKE ON TRUCK Fell off truck	INST-H1
1	7	7	555-1	AN-MONO - ANNEALED MONO	BEVEL	2/23/2022 9:06:39 AM	Reprocessing	BROKE IN MACHINE Got stuck	

The following information is outlined in the ‘Schedule Reject Details’ report:

- **Schedule** – Identifier of the schedule.
- **Batch** – Batch number – Batch description
- **Location** – Production location of where the schedule was released.
- **Release Date** – Date that the schedule was released to production
 - **Batch** – Batch number.
 - **Unit** – Unit number. Clicking the unit number will open the ‘Unit Bill of Material’ report.
 - **Bin** – The ‘Bin’ is an incrementing number assigned to each unit to differentiate units within a batch. This often refers to a bin slot on a cart.
 - **Order-Item** – Alphanumeric identifier of the order and number of the line item. Clicking the link will open the ‘Order Production Status’ report.
 - **Part** – Alphanumeric identifier of the part.
 - **Station** – Station at which the item was rejected.
 - **Date Time** – Date and time the item was rejected.
 - **Status** – Specifies whether the current status is ‘Rejected’ or ‘Reprocessing’. Clicking the link will open the ‘Unit Details’ report.
 - **Details** – Specifies the reject reason selected as well as any reject comments.
 - **Plant Location** – Plant Location of where the item was when it was rejected.

Incomplete Items

Incomplete items are line items that are on orders that have been acknowledged but have not received a completion scan at any station. A ‘Completion’ scan is any status that appears in **green** on the various reports that show status.



Detail & Summary

The ‘Incomplete Items’ page opens in Detail mode. This report shows every unit that exists on a line item of an open acknowledged order that is not yet ‘Complete’. The date range defaults to the last 30 days from the current date, and defaults to searching on ‘Target Ship Date’ so that the user can see what isn’t complete that needs to be shipped. The ‘Display By’ filter allows for this to be changed to search on ‘Required Date’ or ‘Schedule Date’.

To access the ‘Incomplete Items’ menu, go to ‘Production’ >> ‘Incomplete Items’ and select ‘Detailed’

Start Date: End Date:
 Display By: Mode:

Navigation: 1 of 1 | Refresh | Back | 100% | Save | Print | Find | Next

Incomplete Items

Start Date: 9/20/2023 End Date: 9/20/2023 Display By: Target Ship Date Location: Main Location

Date	Order-Item	Customer	Sched-Unit	Part	Size	Qty	Station	Status	Cells
9/20/2023	M-320794-1	48 Fenster AG		ISO2 - MGTherm Ökostar Special Zweifach	800 W X 900 H	20			ZUSCH FLOAT, BW-TEMP1, ISO LINIE 1, LADEN
9/20/2023			14637-1			1	SJCut	Accepted	
9/20/2023			14637-2			1	SJCut	Accepted	
9/20/2023			14637-3			1	SJCut	Accepted	
9/20/2023			14637-4			1	SJCut	Accepted	
9/20/2023			14637-5			1	SJCut	Accepted	
9/20/2023			14637-6			1	SJCut	Accepted	
9/20/2023			14637-7			1	SJCut	Accepted	
9/20/2023			14637-8			1	SJCut	Accepted	
9/20/2023			14637-9			1	SJCut	Accepted	
9/20/2023			14637-10			1	SJCut	Accepted	
9/20/2023			14637-11			1	SJCut	Accepted	
9/20/2023			14637-12			1	SJCut	Accepted	
9/20/2023			14637-13			1	SJCut	Accepted	
9/20/2023			14637-14			1	SJCut	Accepted	
9/20/2023			14637-15			1	SJCut	Accepted	
9/20/2023			14637-16			1	SJunload	Rejected	
9/20/2023			14637-17			1	SJload	Rejected	
9/20/2023			14637-18			1	SJload	Rejected	
9/20/2023			14637-19			1	SJunload	Accepted	

The Incomplete Items Summary mode shows all the same information as the 'Details' page, but it shows one record for each line item rather than showing every individual unit.

Production > Incomplete Items > Details

Start Date: 9/6/2023 End Date: 9/6/2023

Display By: Target Ship Date Mode: Summary

1 of 1 100% Find | Next

Incomplete Items

Start Date: 9/6/2023 End Date: 9/6/2023 Display By: Target Ship Date Location: Main Location

Date	Order-Item	Customer	Sched-Unit	Part	Size	Qty	Station	Status	Cells
9/6/2023	M-320768-1	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	1000 W X 1000 H X 11 T	10			ZUSCH FLOAT, ISO LINIE 2, LADEN
9/6/2023	M-320768-2	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	1000 W X 750 H X 11 T	10			ZUSCH FLOAT, ISO LINIE 2, LADEN
9/6/2023	M-320768-3	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	373.8 W X 958.7 H X 11 T	10			ZUSCH FLOAT, ISO LINIE 2, LADEN
9/6/2023	M-320768-4	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	1000 W X 1000 H X 11 T	10			ZUSCH FLOAT, ISO LINIE 1, LADEN
9/6/2023	M-320769-1	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	277.8 W X 1932 H X 11 T	3			ZUSCH FLOAT, ISO LINIE 1, LADEN
9/6/2023	M-320769-2	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	529 W X 400.2 H X 11 T	10			ZUSCH FLOAT, ISO LINIE 1, LADEN
9/6/2023	M-320770-1	Anker		OkoSpe2 - MGTHerm Ökostar Special Zweifach	1000 W X 1000 H X 11 T	5			ZUSCH FLOAT, ISO LINIE 1, LADEN
9/6/2023	M-320770-1	Anker		aatestpart	1000 W X 1000 H X 11 T	5			
Total Incomplete Qty						63			

Users can also toggle between 'Detail' mode and 'Summary' mode by changing selecting from the Mode drop-down menu, and clicking [View Report](#).

The following information is outlined in the 'Incomplete Items' report for both 'Details' and 'Summary':

- **Date** – Schedule Date', 'Target Ship Date, or 'Required Date', depending upon the user's preference in the 'Display by' filter.
- **Order-Item** – Identifies the order and line item number. If the 'Order-Item' is blank on the 'Details' report, that unit is part of the last 'Order-Item' listed above. Links to the 'Order Status' report.
- **Customer** – The customer name.
- **Sched-Unit** – Schedule number / unit number. Links to the 'Order Production Status' report. (Only populated on the 'Details' report)
- **Part** – Alphanumeric identifier of the part.
- **Size** – Part dimensions.
- **Qty** – Number of items ordered.
- **Station** – Last station through which the item passed.
- **Status** – Unit status. Links to the 'Unit Details' report'.
 - Accepted
 - Scheduled
 - Not Scheduled
 - Released
 - Rejected
- **Cells** – Work cell(s) through which the item will pass.

Work Cell

The 'Incomplete Items by Work Cell' report shows items that are planned to be processed at a work cell but have not been processed yet. The report defaults to the last 30 days from the current date, and defaults to filtering on 'Target Ship Date' so the user can see what still needs to be processed at each work cell for items that will soon ship. This filter can be changed to 'Plan Date'.

To view this report, select 'Schedules' >> 'Incomplete Items' >> 'Work Cell'. Then select a work cell and select 'View Report' to view the data.

Start Date: 8/27/2023 End Date: 9/26/2023
 Work Cell: [All] Display By: Plan Date

Incomplete Items by Work Cell

Start Date: 8/27/2023 End Date: 9/26/2023 Display By: Plan Date Location: MAIN

Plan Date	Shift	TSD	Order-Item	Customer	Part	Size	Qty	Plan	Complete	Rescheduled	Remaining	Schedule	Station	Status	Cells
PURCH (UNITS)															
9/23/2023	1	10/5/2023	11676-1	Atlantic Installers	8510CS-PUR - PURCHASED CASEMENT	36 W X 48 H X 3.25 T	1	1.0	0.0	0.0	1.0			Not Scheduled	PURCH
9/23/2023	1	10/5/2023	11677-1	Atlantic Installers	8510CS-PUR - PURCHASED CASEMENT	36 W X 48 H X 3.25 T	1	1.0	0.0	0.0	1.0			Not Scheduled	PURCH
SASH CUTTING (PIECES)															
8/29/2023	1	8/31/2023	11667-2	Atlantic Installers	8510CS-PUR - PURCHASED CASEMENT	36 W X 48 H X 3.25 T	10	10.0	0.0	0.0	10.0			Not Scheduled	PURCH, SASH CUTTING, PAINT SHOP
PAINT SHOP (WINDOWS)															
8/30/2023	1	8/31/2023	11667-2	Atlantic Installers	8510CS-PUR - PURCHASED CASEMENT	36 W X 48 H X 3.25 T	10	10.0	0.0	0.0	10.0			Not Scheduled	PURCH, SASH CUTTING, PAINT SHOP

The 'Incomplete Items by Work Cell' report details the following information *for each work cell*:

- **Plan Date** – The date the item is planned to be processed at the work cell.
- **Shift** – Planned shift the item is scheduled for at the work cell.
- **TSD** – Target Ship Date. Date the order is expected to ship.
- **Order-Item** – Alphanumeric identifier of the order and the number of each line item. Links to the 'Work Cell Item Details' report.
- **Customer** – Customer's name.
- **Part** – Alphanumeric identifier of the part that is processed at that work cell.
- **Size** – Part dimensions.
- **Qty** – Number of units for that item that still need processed at the work cell.
- **Plan** – Amount planned for production *at that work cell*. This value is determined by 'Item', area, or the 'Production Unit' attribute.
- **Complete** – Amount completed *at that work cell*. This will be measured by 'Item', area, or the 'Production Unit' attribute.
- **Rescheduled** – Number of scheduled units that were rejected and rescheduled through the Remakes screen.
- **Remaining** – Amount remaining that need to be completed. This will be measured by 'Item', area, or the 'Production Unit' attribute.
- **Schedule** – Schedule ID for each order-item.
- **Station** – The last station the units were scanned.
- **Status** – Unit status.
 - **Accepted**
 - **Scheduled**
 - **Not Scheduled**
 - **Released**
 - **Rejected**
- **Cells** – Work cell(s) through which the item will pass.

Work Cell Item Details

The 'Work Cell Item Details' report provides the user with more detail about each unit that must go through a certain work cell for a certain line item by displaying important information such as the station and time the unit was last scanned and the current status of the unit.

To view this report, select the 'Order-Item' link from the 'Incomplete Items by Work Cell' report.

Work Cell Item Details

Order-Item: 9114-1
Part: 8660DH - DOUBLE HUNG
Work Cell: GLASS CUTTING

Plan Date	Shift	Sched-Unit	Bin	Qty	Station	Date Time	Status	Container
2/6/2020	1	4896-1	1	1	Tracking	2/3/2020 3:00:45 PM	Rejected	
2/6/2020	1	4896-2	2	1	Tracking	2/3/2020 3:03:27 PM	Rejected	
2/6/2020	1	4896-3	3	1	QA3UC	2/3/2020 3:47:35 PM	Rescheduled	
2/6/2020	1	4896-4	4	1	Tigerstop	2/3/2020 2:34:20 PM	Accepted	
2/6/2020	1	4897-1	1	1	Tigerstop	2/3/2020 3:49:12 PM	Accepted	

The following fields exist in the 'Work Cell Item Details' report:

- **Order-Item** – Order number and line item number. Links to the 'Order Production Status' report.
- **Part** – Alphanumeric identifier of the part that is processed at this work cell.
- **Work Cell** – Currently selected work cell.
- **Plan Date** – The date the item is planned to be processed at the work cell.
- **Shift** – Planned shift the item is scheduled for at the work cell.
- **Sched-Unit** – Schedule ID / Unit number.
- **Bin** – The 'Bin' is an incrementing number assigned to each unit to differentiate units within a batch. This often refers to a bin slot on a cart.
- **Qty** – Number of parts planned for each unit.
- **Station** – Last station at which the unit was scanned.
- **Date Time** – Date and time of the last scan.
- **Status** – Current status of the unit. This is not necessarily the status of the part planned at the current work cell but the overall status of the unit. For example, say the part planned here has a status of 'Accepted' but another part in the unit's BOM is 'Rejected', the status will be 'Rejected'. Links to the 'Unit Details' report.
- **Container** – Container ID into which the part was placed.

Order Completion

The 'Order Completion Status' report displays all open orders within the specified date range. The date range can be based on 'Order Date', 'Required Date', or 'Target Ship Date', and defaults to a range of 14 days from the current date. It displays the 'Status' of the order, and if the order is complete, the date on which it was completed.

To view this report, go to 'Production' >> 'Order Completion'.

Start Date: 7/27/2023 End Date: 7/27/2023
 Filter: Target Ship Date

1 of 1 100% Find | Next

Order Completion Status

Start Date: 7/27/2023 End Date: 7/27/2023 Filter: Target Ship Date Location: MAIN

Order	Date	Req Date	TSD	Customer	Customer Ref.	Ship Via	Status	Complete Date
11536	6/26/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Complete	6/30/2023
11539	6/30/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Complete	6/30/2023
11540	6/30/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Complete	6/30/2023
11542	6/30/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Not Complete	
11544	6/30/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Not Complete	
11651	7/19/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Not Complete	
11652	7/20/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Not Complete	
11653	7/20/2023	7/27/2023	7/27/2023	Atlantic Installers[28]			Not Complete	

The following information is available in the 'Order Completion Status' report:

- **Order Number** – Identifier of the order. Links to the 'Order Status' report.
- **Date** – Date the order was entered. This is not within the date range indicated.
- **Required Date** – Date by which the order is required to meet production plans.
- **Target Ship Date** – Date the order is expected to ship.
- **Customer** – The customer name.
- **Customer Reference** – Additional identifying information regarding the customer.
- **Ship Via** – How the order is / was shipped.
- **Status** – Reflects if the order is 'Complete' (highlighted in green) or 'Not Complete'.
- **Complete Date** – Date in which the order was completed. Will not be populated unless status is listed as 'Complete'.

Work Cell Activity

The various 'Work Cell Activity' reports give the user an idea of what has been processed at particular work cells over a date range. These reports will show the activity of a day/shift based on what was actually scanned at the planned work cell during the day/shift. If something was planned to go through a work cell on shift 1, but is not actually scanned until shift 2, the report will credit it to shift 2.



Note: The Work Cell Activity reports show the total number of accept and reject scans done during a shift based on the capacity calendar. If a shift starts on one day and ends on the next, the date recorded for the scan will be when the shift began. If a scan/reject happens in between shifts, the system will use the closest shift to the current time, even if that means the previous shift.

By Customer

The 'Work Cell Activity by Customer' report shows what has been processed at work cells for each customer over a particular date range. The report is primarily grouped by 'Work Cell' with a secondary grouping by 'Customer'. By default, the report generates for the last 7 days, with all other filters set to {All}.

To view this report, select 'Production' >> 'Work Cells' >> 'Activity By Customer'.

Start Date: 9/19/2023 End Date: 9/26/2023
 Work Cell: {All} Shift: {All}
 Employee: {All} Customer: {All}
 Site: {All}

1 of 1 100% Find | Next

Work Cell Activity By Customer

Start Date: 9/19/2023 End Date: 9/26/2023 Customer: {All} Site: {All}
 Work Cell: {All} Shift: {All} Employee: {All} Location: MAIN

FINAL ASSEMBLY (MINUTES)

Part	Shift	Complete	Rejected	Complete (MINUTES)	Rejected (MINUTES)	Complete (SqFt)	Rejected (SqFt)
8000PW - PICTURE WINDOW	1	8	1	19.2	2.4	96.0	12.0
8660DH - DOUBLE HUNG	1	10	0	24.0	0.0	120.0	0.0
Totals		18	1	43.2	2.4	216.0	12.0

PAINT SHOP (WINDOWS)

Part	Shift	Complete	Rejected	Complete (WINDOWS)	Rejected (WINDOWS)	Complete (SqFt)	Rejected (SqFt)
8000PW - PICTURE WINDOW	1	8	1	8.0	1.0	96.0	12.0
8660DH - DOUBLE HUNG	1	10	0	10.0	0.0	120.0	0.0
Totals		18	1	18.0	1.0	216.0	12.0

The 'Work Cell Activity by Customer' report details the following information in each work cell table:

- **Work Cell** – Work cell(s) parts passed through according to the indicated date range. The following information is grouped by 'Work Cell'.
 - **Customer** – Customer for whom the orders were processed. The following information is grouped by 'Customer' within each 'Work Cell' grouping.
 - **Part** – The part that has been processed at the work cell.
 - **Shift** – Shift the units were processed at the work cell.
 - **Complete** – The number of units processed in the work cell.
 - **Rejected** – The number of units rejected in the work cell.
 - **Complete (UOM)** – The amount of the unit that has been processed in the configured unit of measure. This is assigned via Core's Work Cells screen in Capacity Planning setup.
 - **Rejected (UOM)** – The amount of the unit that has been rejected in the configured unit of measure. This is assigned via Core's Work Cells screen in Capacity Planning setup.
 - **Completed (Per)** – The amount that has been processed in the work cell's per measurement. This is assigned via Core's Work Cells screen in Capacity Planning setup and can be Item, SqFt/SqM, or Production Unit Attribute (PU).
 - **Rejected (Per)** – The amount that has been rejected in the work cell's per measurement. This is assigned via Core's Work Cells screen in Capacity Planning setup and can be Item, SqFt/SqM, or Production Unit Attribute (PU).

By Date

The 'Work Cell Activity by Date' report shows what has been processed at work cells each day over a particular date range. The report is primarily grouped by 'Work Cell' with a secondary grouping by 'Date'. By default, the report generates for the last 7 days, with all other filters set to {All}.

To view this report, select 'Production' >> 'Work Cells' >> 'Activity By Date'.

Start Date	1/22/2018	End Date	11/29/2018
Work Cell	{All}	Shift	{All}
Employee	{All}		

Work Cell Activity By Date							
Start Date:	1/22/2018	End Date:	11/29/2018				
Work Cell:	{All}	Shift:	{All}	Employee:	{All}	Location:	{All}
CUT (Minutes)							
Date	Shift	Complete	Rejected	Complete (Minutes)	Rejected (Minutes)	Complete (SqFt)	Rejected (SqFt)
1/22/2018	1	57	0	358.7	0.0	717.4	0.0
1/24/2018	1	12	0	25.7	0.0	51.3	0.0
2/9/2018	1	462	0	930.7	0.0	1,861.4	0.0
2/15/2018	1	1	0	9.8	0.0	17.1	0.0
2/26/2018	1	5	0	45.7	0.0	73.0	0.0
3/8/2018	1	1	0	9.8	0.0	17.1	0.0
5/8/2018	1	1	0	12.0	0.0	21.0	0.0
Totals		539	0	1,392.4	0.0	2,758.2	0.0

The 'Work Cell Activity by Date' report details the following information for each work cell selected:

- **Work Cell** – Work cell(s) parts passed through according to the indicated date range for that specific date. The following information is grouped by 'Work Cell'.
 - **Date** – Date that the parts passed through the work cell. The following information is grouped by 'Date' within each 'Work Cell' grouping.
 - **Shift** – Shift the units were processed at the work cell.
 - **Complete** – The number of units processed in the work cell.
 - **Rejected** – The number of units rejected in the work cell.
 - **Complete (UOM)** – The amount of the unit that has been processed in the configured unit of measure. This is assigned via Core's Work Cells screen in Capacity Planning setup.
 - **Rejected (UOM)** – The amount of the unit that has been rejected in the configured unit of measure. This is assigned via Core's Work Cells screen in Capacity Planning setup.
 - **Completed (Per)** – The amount that has been processed in the work cell's per measurement. This is assigned via Core's Work Cells screen in Capacity Planning setup and can be Item, SqFt/SqM, or Production Unit Attribute (PU).
 - **Rejected (Per)** – The amount that has been rejected in the work cell's per measurement. This is assigned via Core's Work Cells screen in Capacity Planning setup and can be Item, SqFt/SqM, or Production Unit Attribute (PU).

By Product

The 'Work Cell Activity by Product' report shows what parts have been processed at work cells over a particular date range. The report is primarily grouped by 'Work Cell' with a secondary grouping by 'Part'. By default, the report generates for the last 7 days with all other filters set to {All}.

To view this report, select 'Production' >> 'Work Cells' >> 'Activity By Product'.

Start Date: 9/19/2023 End Date: 9/26/2023
 Work Cell: {All} Shift: {All}
 Employee: {All}

1 of 1 100% Find | Next

Work Cell Activity By Product

Start Date: 9/19/2023 End Date: 9/26/2023
 Work Cell: {All} Shift: {All} Employee: {All} Location: MAIN

FINAL ASSEMBLY (MINUTES)

Part	Shift	Complete	Rejected	Complete (MINUTES)	Rejected (MINUTES)	Complete (SqFt)	Rejected (SqFt)
8000PW - PICTURE WINDOW	1	8	1	19.2	2.4	96.0	12.0
8660DH - DOUBLE HUNG	1	10	0	24.0	0.0	120.0	0.0
Totals		18	1	43.2	2.4	216.0	12.0

PAINT SHOP (WINDOWS)

Part	Shift	Complete	Rejected	Complete (WINDOWS)	Rejected (WINDOWS)	Complete (SqFt)	Rejected (SqFt)
8000PW - PICTURE WINDOW	1	8	1	8.0	1.0	96.0	12.0
8660DH - DOUBLE HUNG	1	10	0	10.0	0.0	120.0	0.0
Totals		18	1	18.0	1.0	216.0	12.0

The 'Work Cell by Product' report details the following for each work cell selected:

- **Work Cell** – Work cell(s) the parts passed through according to the indicated date range. The following information is grouped by 'Work Cell'.
 - **Part** – The part that has been processed at the work cell. The following information is grouped by 'Part' within each 'Work Cell' grouping.
 - **Shift** – Shift the units were processed at the work cell.
 - **Complete** – The number of units processed in the work cell.
 - **Rejected** – The number of units rejected in the work cell.
 - **Complete (UOM)** – The amount of the unit that has been processed in the configured unit of measure. This is assigned via Core's Work Cells screen in Capacity Planning setup.
 - **Rejected (UOM)** – The amount of the unit that has been rejected in the configured unit of measure. This is assigned via Core's Work Cells screen in Capacity Planning setup.
 - **Completed (Per)** – The amount that has been processed in the work cell's per measurement. This is assigned via Core's Work Cells screen in Capacity Planning setup and can be Item, SqFt/SqM, or Production Unit Attribute (PU).
 - **Rejected (Per)** – The amount that has been rejected in the work cell's per measurement. This is assigned via Core's Work Cells screen in Capacity Planning setup and can be Item, SqFt/SqM, or Production Unit Attribute (PU).

Work Cell Events

The 'Work Cell Events' report details which work cells reported events, planned or unplanned, that might reflect fluctuations in production levels. This helps to determine why the plant floor might not be running as efficiently as expected over a certain date range. By default, the report generates for the last 30 days with all other filters set to {All}.

To access the 'Work Cell Events' screen, go to 'Production' >> 'Work Cells' >> 'Work Cell Events'.

Start Date	2/3/2018	End Date	3/4/2020
Type	{All}	Station	{All}
Shift	{All}		

Work Cell Events			
Start Date:	2/3/2018	End Date:	3/4/2020
Type:	{All}	Station:	{All}
Shift:	{All}	Location:	MAIN

Location	Shift	Type	Event	Qty	%
MAIN	Morning shift	Planned	Changing glue gun	2	50.00%
MAIN	Morning shift	Unplanned	Employee injured on job	2	50.00%
Totals				4	

The 'Work Cell Events' report outlines the following information:

- **Location** – The location the event occurred.
- **Shift** – Shift the event occurred.
- **Type** – Type of event, either 'Planned' or 'Unplanned'.
- **Event** – Detailed description of the work station's event.
- **Quantity** – Number of events at that work station over the date range.
- **%** – Percentage of events generated from the 'Type' and 'Event' over the given date range. This percentage is strictly based on number of events. It doesn't look at length of events or amount of capacity lost due to the event.

Product Produced

The 'Product Produced' report displays a total quantity of parts produced based upon the tracking scan history. The report defaults to showing the last day of production for completed capacity at all stations for all parts. When performing a search over multiple days, only one scan is counted for each individual unit; therefore, when the same item is scanned on multiple days, the weekly total will be less than the total for each individual day added together.

To access the 'Product Produced' screen, go to 'Production' >> Product Produced'.

Start Date:	8/3/2023	End Date:	9/26/2023
Status:	{COMPLETED}	Station:	{All}
Part:	{All}		

Product Produced			
Start Date:	8/3/2023	End Date:	9/26/2023
Status:	{COMPLETED}	Location:	MAIN
Station:	{All}	Part:	{All}

Part	SqFt	Qty
8000PW-PICTURE WINDOW	166.61	12
8660DH-DOUBLE HUNG	120.00	10
8100SH-SINGLE HUNG	30.00	2
8510CS-CASEMENT	10.02	2
8013BAY-3-LITE BAY	36.98	1
OPENING-TMP-WINDOW OPENING	56.25	1
TRPLDHCF-Continuous Frame Triple Double Hung	0.00	1
Total		29

Note: The 'Status' filter contains the options '{COMPLETED}', 'Accepted', and 'Complete'. 'Accepted' finds units that received a status of 'Accept' over the date range. 'Complete' finds units that received a status of 'Complete' over the date range. '{COMPLETED}' finds units that have received any 'completion' scan over the date range. 'Complete', 'Manually Loaded', 'Loaded', 'Manually Unloaded', 'Unloaded', 'Shipped', 'Manually Returned', and 'Returned' are all considered 'Completion' scans.

The 'Product Produced' report details the following information:

- **Part** – Alphanumeric identifier of the part produced.
- **SqFt** – The number of square feet of that part produced.
- **Qty** – The quantity of parts produced over the date range.

Reject Count

The 'Reject Count by Unit' report displays how many times items have been rejected over a date range. This report would be used to determine if there are specific units that keep getting rejected in order to determine if there is a procedural problem that is resulting in certain items being made incorrectly over and over. The report defaults to generate the report for the last 7 days with a reject count of 2 or higher.

To access the 'Reject Count by Unit' report, go to 'Production' >>'Reject Count'.

1. Enter the 'Query' number of days.
2. Enter the 'View' number of days.
3. Select 'View Report'.

Sched-Unit	Order-Item	Customer	Last Time	Count
14612-20	M-320762-1 ISO2	48 Fenster AG	9/21/2023 2:24:31 PM	2
14619-1	M-320771-1 BR2NS	4B Fassaden AG	9/21/2023 9:54:58 AM	2
14638-29	M-320795-2 ISO2	48 Fenster AG	9/21/2023 12:25:39 PM	2
Total				6

The following information is provided in the 'Reject Count by Unit' report:

- **Schedule-Unit** – The schedule number and unit number of the item.
- **Order-Item** – The order number and line item number. The 'Part' is also listed in this field right under the 'Order-Item'.
- **Customer** – Customer name.
- **Last Time** – The date the unit was last rejected.
- **Count** – The number of times the unit was rejected.

Containers

The 'Containers' report provides a quick view of the status of every container. This is helpful when identifying if a container is a shipping or production container, the current quantity in the container, what station the container is at, and the status of the units in the container.

To access the 'Container' report, go to 'Production' >>'Containers' >> 'Containers'.

Containers

Container	Type	Qty	Station	Date Time	Status	Customer
LW40	Shipping	0	Trucking	10/4/2019 11:16:33 AM	Shipped	Charleston Hardware
LW85	Shipping	1	FV CORE-0	3/3/2020 4:59:45 PM	Shipped	KD Windows
P1	Production	1	MTracking	8/8/2019 2:43:44 PM	Released	
P2	Production	0	tracking	5/30/2019 9:02:05 AM	Complete	
S1	Shipping	9	trucking	4/30/2019 10:07:00 AM	Manually Loaded	FeneTech

The following information is available in the 'Containers' report:

- **Container** – Container ID. Links to the 'Container Details' report if there are items in the container.
- **Type** – Shipping, production, or plant location container.
- **Qty** – Quantity of items in the container.
- **Station** – Last station at which the container was scanned.
- **Date Time** – Date and time the container was last scanned.
- **Status** – Container's status.
- **Customer** – For shipping containers that have a 'Completion' scan (any scan in green) but have not yet been 'Returned', this shows the Customer that the container is currently at or will go to.

Container Pickup

The 'Containers Ready for Pickup' shows containers that have been delivered to a customer and are ready to be picked up.

To access this report, go to 'Production' >> 'Containers' >> 'Pickup'.

Container	Customer ID	Customer	Order	Address	Date Time
S2	18	FeneTech			2/25/2020 1:12 AM
Comments:					
t1	18	FeneTech			2/25/2020 1:12 AM
Comments:					
S3	18	FeneTech			2/25/2020 1:12 AM
Comments:					
LW40	23	Charleston Hardware			10/4/2019 11:16 AM
Comments:					


The 'Containers Ready for Pickup' report contains the following information:

- **Container** – Identifier of the container ready to be picked up.
- **Customer ID** – Customer ID number.
- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order.
- **Address** – Customer address where container can be picked up.
- **Date / Time** – Date and time container will be ready for pickup.
- **Comments** – Any comments regarding the status of the container ready to be picked up.

Plant Location

The 'Plant Location' dialog allows the user to change the 'Plant location' of a part in the event that there was a mistake made during pre-assignment.

To access this dialog, go to 'Production' >> 'Containers' >> 'Location'.

1. Enter the order number or PO number.
2. Select .

Order Number	PO Number	Customer	Ordered	Ships Separately
319397		"A" nicht verwenden	5	0

Sched-Unit	Item	Item Qty	Part	Size	Station	Date/Time	Status	Plant Location
14038 - 1	1	5 of 5	Manu23		FVCCORE-0	Dec 17, 2021, 9:00 AM	Shipped	<input type="text"/>
14038 - 2	1	4 of 5	Manu23		FVCCORE-0	Dec 17, 2021, 9:00 AM	Shipped	<input type="text"/>
14038 - 3	1	3 of 5	Manu23		FVCCORE-0	Dec 17, 2021, 9:00 AM	Shipped	<input type="text"/>
14038 - 4	1	2 of 5	Manu23		FVCCORE-0	Dec 17, 2021, 9:00 AM	Shipped	<input type="text"/>
14038 - 5	1	1 of 5	Manu23		FVCCORE-0	Dec 17, 2021, 9:00 AM	Shipped	<input type="text"/>

The following information is included in the 'Container Location' report:

- **Order Number** – Alphanumeric order identifier.
- **PO Number** – Purchase order number.
- **Customer** – Customer name.
- **Ordered** – Shows the number of units on the order.
- **Ships Separately** – Shows the number of parts that ship separately on the order.
- **Schedule-Unit** – Schedule number and unit number.
- **Item** – Line Item number.
- **Item Qty** – The particular item out of the total number of items, e.g., the third unit in a line item of with 10 units would display as '3 of 10'.
- **Part** – Alphanumeric identifier and description of the part.
- **Size** – Width, height, and thickness of the part.
- **Station** – Identification of the station where the part was last scanned.
- **Date / Time** – Date and time the most recent scan.
- **Status** – Status of the unit.
- **Location** – Use the drop-down to assign the unit to a 'Plant Location' container.

Lot Search

The 'Lot Number Search' report allows users to enter a lot number to see all orders that were produced from that 'lot' of material. This report is useful when determining all other units created from a lot that has been deemed inadequate to use and will show a quick count of completed quantity and shipped quantity of the items.

To access the 'Lot Number Search' report, select 'Production' >> 'Lot Search'

Lot Number Search								
Lot Number: 1								
Part			Customer					
GN-S14CL			Abercrombie Glass Fabricators					
Order-Item	Part	Size	Date	Ship Date	Project	Customer Ref	Qty	Shipped Qty
270244-1	AI14-ANNEALED INSULATING 1/4"	30W X 45H X 1T	9/26/2013				5	0
270518-1	T14-TEMPERED GLASS 1/4"	20W X 20H	12/30/2013				400	0
270527-1	T14-TEMPERED GLASS 1/4"	5W X 5H	12/30/2013				400	0
270605-1	T14-TEMPERED GLASS 1/4"	49 3/8W X 38 11/16H	1/13/2014				1	0
270605-2	T14-TEMPERED GLASS 1/4"	46 43/64W X 46 1/16H	1/13/2014				1	0
270605-3	T14-TEMPERED GLASS 1/4"	50 7/8W X 38 43/64H	1/13/2014				1	0
270605-4	T14-TEMPERED GLASS 1/4"	48 1/16W X 45 31/32H	1/13/2014				1	0
270605-5	T14-TEMPERED GLASS 1/4"	50 31/64W X 43 1/2H	1/13/2014				1	0
270605-6	T14-TEMPERED GLASS 1/4"	47 51/64W X 50 15/32H	1/13/2014				1	0
270605-7	T14-TEMPERED GLASS 1/4"	49 31/32W X 43 17/64H	1/13/2014				1	0
270605-8	T14-TEMPERED GLASS 1/4"	47 31/64W X 50 25/64H	1/13/2014				1	0
270605-9	T14-TEMPERED GLASS 1/4"	33 21/32W X 28 63/64H	1/13/2014				1	0
270605-10	T14-TEMPERED GLASS 1/4"	56 27/64W X 24 63/64H	1/13/2014				1	0
270619-1	AI14-ANNEALED INSULATING 1/4"	35W X 45H X 1T	1/16/2014				300	0
270620-1	AI14-ANNEALED INSULATING 1/4"	35W X 45H X 1T	1/16/2014				250	0
270892-1	AI14-ANNEALED INSULATING 1/4"	33W X 44H X 1T	1/28/2014				20	0
270892-2	AI14-ANNEALED INSULATING 1/4"	32W X 41H X 1T	1/28/2014				1	0
270897-1	AI14-ANNEALED INSULATING 1/4"	33W X 44H X 1T	1/28/2014				11	0
270900-1	AI14-ANNEALED INSULATING 1/4"	33W X 33H X 1T	1/28/2014				5	0
271361-1	AI14-ANNEALED INSULATING 1/4"	25W X 32H X 1T	3/19/2014				20	0
271381-1	AI14-ANNEALED INSULATING 1/4"	33W X 44H X 1T	3/24/2014	4/8/2014			20	152

To access a specific lot, enter a lot number or part of a lot number in the 'Lot Number' field. Select [View Report](#). The following information is available on the 'Lot Number Search' report:

- **Part** – Alphanumeric identifier of the part in the lot.
- **Customer** – Customer name.
- **Order-Item** – Identifier of the order and line item number. Links to the 'Order Status' report.
- **Part** – Detailed description of the ordered part.
- **Size** – Width, height, and thickness of the order-item.
- **Date** – Date the order was entered.
- **Ship Date** – Date the order was shipped.
- **Project** – If the order-item is associated with a project, this is the identifier of the project.
- **Customer Ref** – Additional identifying information regarding the customer.
- **Qty** – Number of items for that order.
- **Shipped Qty** – Number of items shipped.

Opti Releases

The 'Opti Releases' report provides the viewer with detailed information about FeneVision Opti releases within a given date range. This report is helpful in determining what releases are scheduled for each machine, as well as the yield each release is getting. By default, the report generates for the last 14 days.

To access this report, go to 'Production' >> 'Opti Releases'.

Start Date: 9/12/2023 End Date: 9/26/2023

1 of 1 100% Find | Next

Opti Releases

Start Date: 9/12/2023 End Date: 9/26/2023

Run Date	Release	Machine	Yield %	Total SqM	Product SqM	Qty	Complete Qty
9/21/2023	[11612] SJ AST-1	BW dyn	50.2 (49.0)	135.78	66.60	80	75
9/20/2023	[11608] SJ AST-2	BW Batch	82.0 (80.1)	77.40	61.98	81	39
9/19/2023	[11603] JV40253	JH Cutter	3.2 (3.2)	1.49	0.05	40	0
9/18/2023	[11602] ShapeTest1	BW Batch	82.4 (82.4)	375.57	309.55	700	700
9/15/2023	[11601] BW-38055-9/15-1	JH dynamic	6.6 (6.2)	14.45	0.90	1	1
9/15/2023	[11600] BW-39636-9/15-1	BW dyn	84.1 (80.1)	269.64	216.00	240	36
9/15/2023	[11599] SJ 0915-4	BW Batch	81.4 (76.6)	11.40	8.73	11	0
9/15/2023	[11598] BW-DYN-9/15-1	JH dynamic	6.2 (6.2)	14.45	0.90	1	0
9/15/2023	[11597] SJ 0915-3	BW dyn	78.7 (74.8)	81.86	61.22	70	70
9/15/2023	[11596] SJ0915-2	BW dyn	84.3 (80.1)	33.71	27.00	30	0
9/15/2023	[11595] SJ 0915-1	BW dyn	93.5 (93.5)	28.89	27.00	30	30
9/13/2023	[11593] JS Opt 9/13/23	KD Batch	83.2 (83.2)	72.23	60.06	100	0
9/12/2023	[11591] JS Opt 9/12	JS Hegla	2.6 (2.5)	19.26	0.48	1	0
Totals			75.7 (74.0)	1136.10	840.47	1385	951

The following information is available on the 'Opti Releases' report:

- **Run Date** – Date the release was run through Opti.
- **Release** – Release identifier. Links to 'Opti Release Summary' report.
- **Machine** – Name of the responsible for cutting the release.
- **Yield %** – Percentage of the sheets that are used as production (Yield % = 100 x Product SqFt / Total SqFt). The first number counts edge trims as 'production' since it's area that cannot be optimized on. The second number (in parenthesis) does not count edge trims as 'production'.
- **Total SqFt (SqM)** – Total area of glass used for these patterns.
- **Product SqFt (SqM)** – Total area of the lites that are cut from the sheets.
- **Qty** – Number of lites in the release.
- **Complete Qty** – Number of lites that have been cut.

Opti Release Summary

The 'Opti Release Summary' provides a summary of the different glass types on a release. This report is helpful in identifying which glass may be producing poor yields, as well as what racks are associated with the release.

Users can access the 'Opti Release Summary' report in the following ways:

1. In the 'Opti Releases' report, select the 'Release' link.
2. In the 'Opti Release Details' report, select the 'Release' link.
3. In the 'Opti Release Racks' report, select the 'Release' link.
4. In the 'Opti Rack Details' report, select the 'Release' link.

Opti Release Summary

Release: [12154] Opti BI Reports

Racks: 29-40, 29-41, 29-42, 29-43, 29-25, 29-26

Machine: BW CUTTER

Part	Patterns	Yield %	Total SqFt	Product SqFt	Qty	Complete Qty
S14CLLA080120 - 1/4 CL 030 CAT II LAMI 80X120	11	60.5(60.5)	733.3	443.7	44	0
S14CL108144 - 1/4 CL SS 108 X 144	1	92.4(92.4)	108.0	99.7	9	0
S14CL072130 - 1/4 CL SS 72 X 130	7	99.0(98.3)	455.0	447.4	35	10
S14DI078100 - 1/4 DIAMOND WIRE SS 78X100	13	36.2(36.2)	704.2	255.2	25	0
S14EV096130 - 1/4 EVERGREEN SS 96X130	5	61.6(61.6)	433.3	266.8	25	0
S18CL096130 - DST (3.2mm) CL STK SH 96X130	6	68.2(62.2)	520.0	323.3	35	0
S18EN096130 - DST PILK LOWE SS 96X130	6	68.2(62.2)	520.0	323.3	35	0
Totals	49	63.9(62.2)	3,473.8	2,159.3	208	10

The following information is available on the 'Opti Release Summary' report:

- **Release** – Release identifier. Links to the 'Opti Release Details' report.
- **Racks** – Racks that the lites on the release are assigned to. Links to the 'Opti Release Racks' report
- **Machine** – Name of the responsible for cutting the release.
- **Part** – Part identifier. Links to the 'Opti Release Details' report.
- **Patterns** – Number of patterns for the glass type.
- **Yield %** – Percentage of the sheets that are used as production (Yield % = 100 x Product SqFt / Total SqFt). The first number counts edge trims as 'production' since it's area that cannot be optimized on. The second number (in parenthesis) does not count edge trims as 'production'.
- **Total SqFt (SqM)** – Total area of the glass type used for these patterns.
- **Product SqFt (SqM)** – Total area of the lites that are cut from the sheets.
- **Qty** – Number of lites from this glass type in the release.
- **Complete Qty** – Number of lites from this glass type that have been cut for this release.

Opti Release Details

The 'Opti Release Details' report provides detailed information about all patterns within a release. This report is useful when looking further into an individual release to determine individual pattern yields and totals, as well as checking the status lites on the release.

To access this report, select the 'Release' link or the 'Part' link in the 'Opti Release Summary' report. The 'Release' link shows all patterns for that release. The 'Part' link shows all patterns from that part for that release.

Opti Release Details

Release: [12150] MO RPT

Machine: BRETT CUTT

Pattern	Part	Yield %	Total SqFt	Product SqFt	Qty	Complete Qty
1	GN-S14CL - 1/4 CL SS [RS]	100.0(98.1)	15.7	15.5	3	3
2	GN-S14CL - 1/4 CL SS [RS]	100.0(98.1)	15.7	15.5	3	3
3	GN-S14CL - 1/4 CL SS [RS]	100.0(98.1)	15.7	15.5	3	3
4	GN-S14CL - 1/4 CL SS [RS]	100.0(98.4)	8.7	8.5	1	1
5	GN-S14CL - 1/4 CL SS [RS]	99.5(97.3)	34.2	33.2	6	6
6	GN-S14CL - 1/4 CL SS [RS]	100.0(100.0)	33.0	33.0	4	2
Totals		99.9(98.4)	123.1	121.2	20	18

The following information is available on the 'Opti Release Details' report:

- **Release** – Release identifier. Links to the 'Opti Release Summary' report.
- **Machine** – Name of the cutting machine.
- **Pattern** – Pattern number within the release.
- **Part** – Part identifier.

- **Yield %** – Percentage of the sheets that are used as production (Yield % = 100 x Product SqFt / Total SqFt). The first number counts edge trims as ‘production’ since it’s area that cannot be optimized on. The second number (in parenthesis) does not count edge trims as ‘production’.
- **Total SqFt (SqM)** – Total area of the glass type used for these patterns.
- **Product SqFt (SqM)** – Total area of the lites that are cut from the sheets.
- **Qty** – Number of lites from this glass type in the release.
- **Complete Qty** – Number of lites from this glass type that have been cut for this release.

Opti Release Racks

The ‘Opti Release Racks’ report provides information about the racks used for the selected release. This report can be used to identify which rack(s) will contain for the glass, by schedule, from a release.

To access this report, select the ‘Racks’ link from the ‘Opti Release Summary’ report.

Opti Release Racks					
Release: [12150] MO RPT					
Schedule	Work Route	Work Cell	Rack	Qty	Complete Qty
13797	AI	CUT	97-22	20	18
Totals				20	18

The following information is available on the ‘Opti Release Racks’ report:

- **Release** – Release identifier. Links to the ‘Opti Release Summary’ report.
- **Schedule** – Schedule containing the lites on the rack. Links to the ‘Schedule Orders’ report.
- **Work Route** – Identifier of the work route the rack will follow. This is configured in FeneVision Core.
- **Work Cell** – First production cell through which the rack will go.
- **Rack** – Identifier of the rack. The rack tag is comprised of the last two digits of the ‘Schedule ID / Container’ prefix from FeneVision Core. Links to the ‘Opti Rack Details’ report.
- **Qty** – Number of lites from this glass type in the release.
- **Complete Qty** – Number of lites from this glass type that have been cut for this rack.

Opti Rack Details

The ‘Opti Rack Details’ report provides the user with detailed information regarding what units are assigned to a rack.

Users can access the ‘Opti Rack Details’ report in the following ways:

1. In the ‘Opti Release Racks’ report, select the ‘Rack’ link.
2. In the ‘Unit Details’ report, select the ‘Rack-Slot’ link.

Opti Rack Details

Rack: 15-1

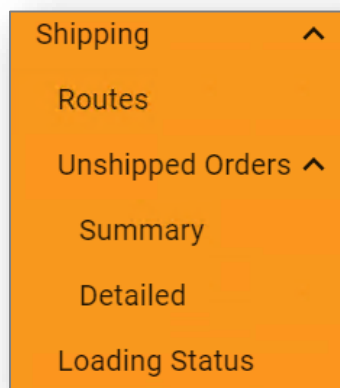
Slot	Schedule	Unit	Order-Item	Part	Size	Date Time	Machine	Status	Release
1	13915	1	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Complete	12318
2	13915	1	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Complete	12318
3	13915	2	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Complete	12318
4	13915	2	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Complete	12318
5	13915	3	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Complete	12318
6	13915	3	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Complete	12318
7	13915	4	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Rejected	12319
8	13915	4	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:43:24 PM	BW CUTTER	Rejected	12319
9	13915	5	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:56 PM	BW CUTTER	Complete	12318
10	13915	5	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:56 PM	BW CUTTER	Complete	12318
11	13915	6	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:56 PM	BW CUTTER	Complete	12318
12	13915	6	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:56 PM	BW CUTTER	Complete	12318
13	13915	7	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:54 PM	BW CUTTER	Complete	12318
14	13915	7	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:54 PM	BW CUTTER	Complete	12318
15	13915	8	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:54 PM	BW CUTTER	Complete	12318
16	13915	8	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:54 PM	BW CUTTER	Complete	12318
17	13915	9	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:51 PM	BW CUTTER	Complete	12318
18	13915	9	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:51 PM	BW CUTTER	Complete	12318
19	13915	10	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:51 PM	BW CUTTER	Complete	12318
20	13915	10	275072-1	GN-S14CL - 1/4 CL SS	30 W X 40 H	10/7/2015 4:41:51 PM	BW CUTTER	Complete	12318

The following information is available on the 'Opti Rack Details report:

- **Rack** – Identifier of the rack. The rack tag is comprised of the last two digits of the 'Schedule ID / Container' prefix from FeneVision Core.
- **Slot** – The position the lite will be placed on the rack once it is cut. For stacked racks, it will read 'SideStack.Position' meaning that if it reads '12.3' it means 'Side 1, Stack 2, Position 3'. This data originates from the rack that is generated during schedule release in FeneVision Core.
- **Schedule** – Schedule on which the release can be found. Links to the 'Schedule Orders' report.
- **Unit** – Number of the unit on the schedule. Links to the 'Unit Details' report.
- **Order-Item** – Identifier of the order and the line item number. Links to the 'Order Production Status' report.
- **Part** – Part identifier.
- **Size** – Height and width of the lite.
- **Date Time** – Date and time the lite was cut.
- **Machine** – Name of the cutting machine.
- **Status** – The status of the unit—Released, Rejected, Complete
- **Release** – Identifier of the release. Links to the 'Opti Release Summary' report.

Shipping

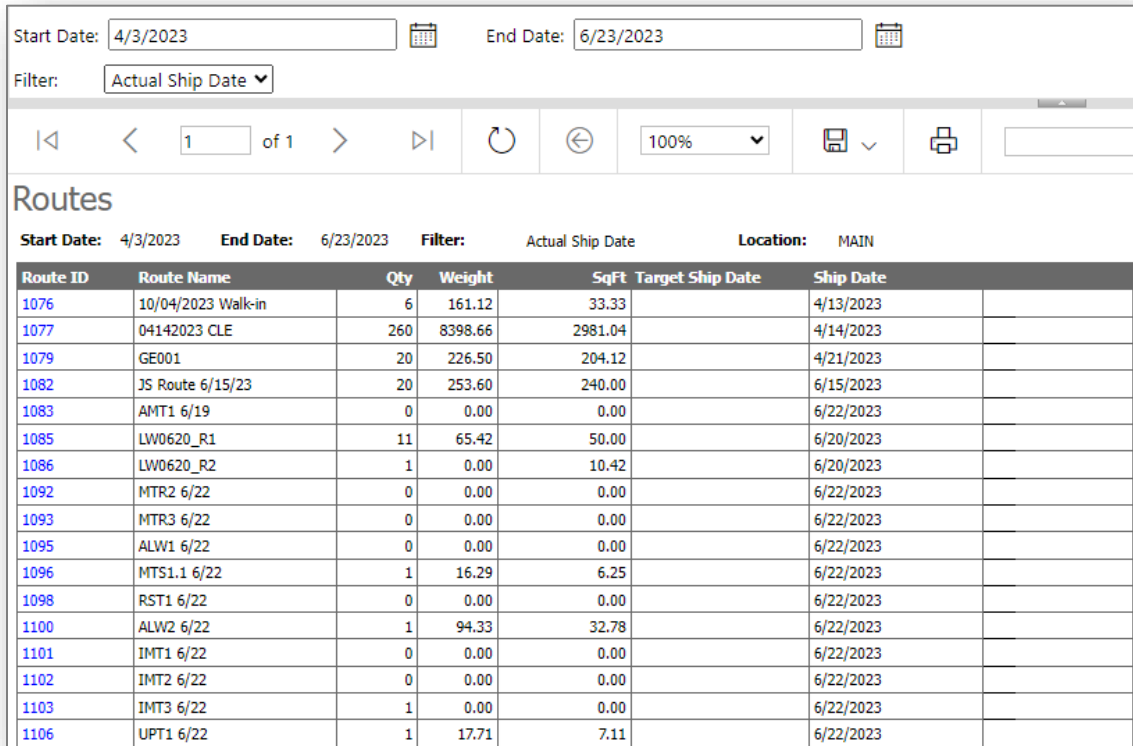
'Shipping' reports contain information regarding shipping routes and helps production personnel identify unshipped orders.



Routes


The 'Routes' report displays routes within a specified date range based on the filter type. The report can be viewed by 'Actual Ship Date' or 'Target Ship Date'. By default, the report generates for the last day with the filter set to 'Actual Ship Date'.

To access the 'Routes' report, select 'Shipping' >> 'Routes' from the drop-down menu.



Route ID	Route Name	Qty	Weight	SqFt	Target Ship Date	Ship Date
1076	10/04/2023 Walk-in	6	161.12	33.33		4/13/2023
1077	04142023 CLE	260	8398.66	2981.04		4/14/2023
1079	GE001	20	226.50	204.12		4/21/2023
1082	JS Route 6/15/23	20	253.60	240.00		6/15/2023
1083	AMT1 6/19	0	0.00	0.00		6/22/2023
1085	LW0620_R1	11	65.42	50.00		6/20/2023
1086	LW0620_R2	1	0.00	10.42		6/20/2023
1092	MTR2 6/22	0	0.00	0.00		6/22/2023
1093	MTR3 6/22	0	0.00	0.00		6/22/2023
1095	ALW1 6/22	0	0.00	0.00		6/22/2023
1096	MTS1.1 6/22	1	16.29	6.25		6/22/2023
1098	RST1 6/22	0	0.00	0.00		6/22/2023
1100	ALW2 6/22	1	94.33	32.78		6/22/2023
1101	IMT1 6/22	0	0.00	0.00		6/22/2023
1102	IMT2 6/22	0	0.00	0.00		6/22/2023
1103	IMT3 6/22	1	0.00	0.00		6/22/2023
1106	UPT1 6/22	1	17.71	7.11		6/22/2023

The following information is available on the 'Routes' report:

- **Route ID** – Numeric identifier of the route. Links to the 'Route Orders' report.
- **Route Name** – Identifiable description of the route.
- **Quantity** – Number of items on the route (truck).
- **Weight** – Total weight of the items on the route.
- **SqFt (SqM)** – Total square feet or square meters of the items on the route.
- **Target Ship Date** – Date the order is expected to ship.
- **Ship Date** – Actual date the items were shipped.
- **Images** – The  icon will appear if images exist for the route that were added in the Mobile Delivery application. If images were marked important, that icon will appear with a red exclamation point.

Route Orders

The 'Route Orders' report lists all orders placed on the selected route. This report is helpful to see overall route information and stop information, especially orders assigned to each stop of the route.

Users can access the 'Route Orders' report in the following ways:

1. In the 'Shipping History' report, select the 'Route' link.
2. In the 'Routes' report, select the 'Route ID' link.

Route Orders

Route: JS Route 3/14

Ship Date: 3/14/2016

Stop: 1 [Details](#)


Arrival Date:

Delivered Date: 3/14/2016

Order	Packing Slip	Customer	Order Date	Req Date	Target Ship Date	Comments
741386	41657	Design Zone	3/14/2016	3/15/2016	3/15/2016	
741387	41658	Design Zone	3/14/2016	3/23/2016	3/23/2016	

The following information is available on the 'Route Orders' report:

- **Route** – Unique identifier for the route name.
- **Ship Date** – The date the route was shipped.
- **Stop** – Number of the route's stop. This also indicates that the order designated for 'Stop 1' will be the last order loaded onto the truck.
- **Details** – Hyperlink that will be displayed if a 'Stop' image is taken in the Mobile Delivery application.
- **Arrival Date** – The route's scheduled arrival date at the customer's facility.
- **Delivered Date** – The date the shipment was delivered to the customer's facility.
- **Order** – Order identifier. Links to the 'Shipping History' report.



Note: The  icon will appear for each stop images exist for the stop that were added in the Mobile Delivery application. If images were marked important, that icon will appear with a red exclamation point.



Unshipped Orders

Summary











The 'Unshipped Orders' report displays information about all unshipped orders with target ship date within a designated date range for a specified customer and/or vendor. This report helps to identify which items are late to ship or which items will be shipping soon. The report is especially helpful when looking for orders for a specific customer or vendor. By default, the report generates for the last 7 days for all customers and no vendors.

To access the 'Unshipped Orders' reports, select 'Shipping' >> 'Unshipped Orders' and choose 'Summary' from the drop-down menu.

Start Date:  End Date: 

Customer:  Vendor ID: 

Hide Walk-Ins: True False

Navigation:   of 1        

TSD	Customer	Order	Req Date	Order Qty	Ship Qty	Next Route
8/1/2023	ABC Windows	474-3	8/1/2023	1	0	
	ABC Windows	490-10	8/1/2023	1	0	
	ABC Windows	490-13	8/1/2023	1	0	
	ABC Windows	490-4	8/1/2023	1	0	
	ABC Windows	490-7	8/1/2023	1	0	
	ABC Windows	492-2	8/1/2023	1	0	
	ABC Windows	494-3	8/1/2023	1	0	
Totals				7	0	
8/7/2023	ABC Windows	494-1	8/7/2023	1	0	
	ABC Windows	490-8	8/7/2023	1	0	
	ABC Windows	492-1	8/7/2023	1	0	
	ABC Windows	490-6	8/7/2023	1	0	
	ABC Windows	490-3	8/7/2023	1	0	
	ABC Windows	490-11	8/7/2023	1	0	
	ABC Windows	474-1	8/7/2023	1	0	
	ABC Windows	490-1	8/7/2023	2	0	
	ABC Windows	474-4	8/7/2023	2	0	
	ABC Windows	489-1	8/7/2023	2	0	
Totals				13	0	

Users may identify a Start Date, End Date, Customer(s), and / or Vendor(s) for this report; as well as, choose to hide walk-in type orders from the report.

The following information is available on the 'Unshipped Orders' report:

- **TSD** – Stands for 'Target Ship Date'. Date the order is expected to ship.
- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Required Date** – Date the customer requires the order to be shipped.
- **Order Qty** – Quantity of items on the order.
- **Ship Qty** – Quantity of items on the order that have been shipped.
- **Next Route** – The next route the order will be shipped on.

Detailed

The 'Unshipped Items' report displays information about all unshipped items on orders with a target ship date within a designated date range for a specified customer and/or vendor. By default, the report generates for the last 7 days for all customers and no vendors.

To access the 'Unshipped Orders' reports, select 'Shipping' >> 'Unshipped Orders' and choose 'Detailed' from the drop-down menu.

Start Date: 8/3/2023 End Date: 10/12/2023
 Customer: {All} Vendor ID: {None}
 Hide Walk-Ins: True False

1 of 1 100% Find | Next

Unshipped Items

Start Date: 8/3/2023 Customer: {All} Location: MAIN
 End Date: 10/12/2023 Vendor: {None}

TSD	Customer	Order-Item	Req Date	Part	Size	Qty	Ship Qty	Next Route
8/7	ABC Windows	474-1-1	8/7	8660DH-DOUBLE HUNG with PUR	36 W X 60 H	1	0	
	ABC Windows	474-1-1	8/7	8660DH-SCRN-DOUBLE HUNG SCREEN	36 W X 60 H	1	0	
	ABC Windows	474-4-1	8/7	8660DH-DOUBLE HUNG with PUR	36 W X 60 H	2	0	
	ABC Windows	474-4-1	8/7	8660DH-SCRN-DOUBLE HUNG SCREEN	36 W X 60 H	2	0	
	ABC Windows	489-1-1	8/7	PW3000-3000 SERIES PICTURE WINDOW	48 W X 60 H	1	0	
	ABC Windows	489-1-2	8/7	8510CS-LS-CASEMENT SASH	46 5/16 W X 58 5/16 H	1	0	
	ABC Windows	490-1-1	8/7	8000PW-PICTURE WINDOW	36 W X 48 H	2	0	
	ABC Windows	490-11-1	8/7	8000PW-PICTURE WINDOW	36 W X 48 H	1	0	
	ABC Windows	490-3-1	8/7	8000PW-PICTURE WINDOW	36 W X 48 H	1	0	
	ABC Windows	490-6-1	8/7	8000PW-PICTURE WINDOW	36 W X 48 H	1	0	
	ABC Windows	490-8-1	8/7	8000PW-PICTURE WINDOW	36 W X 48 H	1	0	
	ABC Windows	492-1-1	8/7	8220SL-TWO-LITE SLIDER	36 W X 60 H	1	0	
	ABC Windows	492-1-1	8/7	8220SS-F-2L SLIDER FRAME	36 W X 60 H	1	0	
	ABC Windows	492-1-1	8/7	8220SS-LS-2L SLIDER LOCK SASH	36 W X 60 H	1	0	
	ABC Windows	494-1-1	8/7	8100SH-SINGLE HUNG	15 3/4 W X 60 H	1	0	
	ABC Windows	494-1-1	8/7	8100SH-SCRN-SINGLE HUNG SCREEN	15 3/4 W X 60 H	1	0	
Totals						19	0	
8/9	ABC Windows	489-4-1	8/9	8100SH-F-SINGLE HUNG FRAME	24 W X 36 H	1	0	
	ABC Windows	489-4-2	8/9	8000PW-PICTURE WINDOW	48 W X 60 H	1	0	
Totals						2	0	

Users may identify a Start Date, End Date, Customer(s), and / or Vendor(s) for this report; as well as, choose to hide walk-in type orders from the report.

The following information is available on the 'Unshipped Items' report:

- **TSD** – Stands for 'Target Ship Date'. Date the order is expected to ship.
- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Required Date** – Date the customer requires the order to be shipped.
- **Part** – Detailed identifier of the part, including dimensions.
- **Qty** – Line item quantity.
- **Ship Qty** – Quantity of the line item that has been shipped.
- **Next Route** – The next route the line item will be shipped on.

Loading Status

The 'Loading Status' report lists all unshipped routes. This report is helpful to see overall route information and determine if the units on the route are complete, loaded, and ready to be shipped. This report automatically refreshes at a set interval of 10 minutes to ensure the latest information is always showing without the need to select refresh.

To access the 'Loading Status' report, select 'Shipping' >> 'Loading Status' from the drop-down menu.

Route: DZ1106-1

1 of 1 100%

Loading Status

Location: MAIN Route: DZ1106-1
 Route: DZ1106-1 Target Ship Date:

Stop:2 Customer: Anker

Order-Item	Qty	Part	Container	Plant Location	Station	Date Time	Status	Employee
M-311889-1	1	OkoSpe2			Fenqaw101	3/13/2017 10:48:47 AM	Loaded	Zurcher, Dylan
M-311889-1	1	OkoSpe2			Fenqaw101	3/13/2017 10:48:47 AM	Loaded	Zurcher, Dylan

Stop:1 Vendor: Design Zone Glass LLC

Order-Item	Qty	Part	Container	Plant Location	Station	Date Time	Status	Employee
ZZ100975-1	1	OkoSpe2						

By default, the report will run for all unshipped routes; however, the user may select a specific route from the dropdown.

The following information is available on the 'Loading Status' report:

- **Order-Item** – Shows the order number, line item, and if applicable, the subline item numbers.
- **Qty** – Shows the quantity for each line item.

Note: Manufactured and non-manufactured items will show in this report. Ordered items will show a total quantity for each line item until manufactured items are scheduled. Once scheduled each schedule-unit will show as it's own line within the report. Non-manufactured items will always stay as one line per order-item with the total line item quantity.

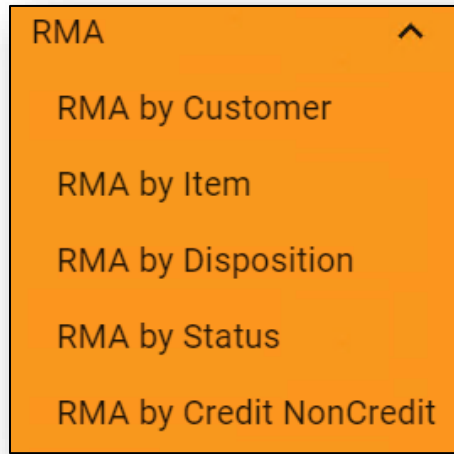
- **Part** – Part number for each order-item.

Note: Hovering over the part number will show a tooltip with the SUMP for the unit.

- **Container** – Shipping or Production container the unit is assigned to.
- **Plant Location** – Plant location the unit is assigned to. Will clear when a unit is scanned into a container or loaded onto a truck.
- **Station** – The last station the item was scanned.
- **Date Time** – The date and time of the last scan to occur for the unit.
- **Status** – The unit's status. Shows green if the unit is either 'Loaded' or 'Manually Loaded'. Select the hyperlink to go to the 'Unit Details' report.
- **Employee** – Shows the employee responsible for the last scan of the unit.

RMA

'RMA' reports contain information regarding return material authorizations and helps management identify problem areas and / or parts.



RMA by Customer

The 'RMA by Customer' report displays RMA information per customer within the specified date range. It includes the quantity, total price, and total cost for each customer. By default, the date range is one month from the current date based on creation date of the RMA. This report is particularly helpful in identifying which customers are being affected most by RMAs.

To access this report, select 'RMA' >> 'RMA by Customer'.

Customer	Qty	Total Price	Total Cost
ABC Windows	36	\$21,523.02	\$115,632.51
Atlantic Installers	8	\$4,030.26	\$13,290.70
Bird Construction	4	\$2,074.37	\$205.92
Totals	48	\$27,627.65	\$129,129.12

The following information is available on the 'RMA by Customer' report:

- **Customer** – Customer name. Links to the RMA by Item report filtered for the customer selected.
- **Qty** – The quantity of RMAs created for the customer in the given date range
- **Total Price** – The total price of all of the RMAs charged to the individual customer within the given date range.
- **Total Cost** – The total cost of the returned products for all of the RMAs for the individual customer within the given date range.

RMA by Item

The 'RMA by Item' report displays RMA information per item within the specified date range. It includes the quantity, total price, total cost, and percentage for each item. By default, the date range is one month from the current date based on creation date of the RMA. Category ID, Customer, and Site are all defaulted to {All}. This report is particularly helpful in identifying problem items.

Users can access the 'RMA by Item' report in the following ways:

1. Select 'RMA' >> 'RMA by Item'.
2. In the 'RMA by Customer' report, select the 'customer' link.

Start Date: 7/3/2023 End Date: 10/12/2023
 Category ID: {All} Customer: {All}
 Site: {All} Currency: Canadian Dollar

1 of 1 100% Find | Next

RMA by Item

Start Date: 7/3/2023 End Date: 10/12/2023 Category: {All} Location: {All}
 Customer: {All} Site: {All}

Part	Qty	Total Price	Total Cost	%
8000PW - PICTURE WINDOW	17	\$8,276.95	\$453.10	35.42%
8015BOW - 5-LITE BOW	1	\$1,335.00	\$106.47	2.08%
8100SH - SINGLE HUNG	16	\$5,138.44	\$66,827.76	33.33%
8100SH.TWIN - SINGLE HUNG TWIN	1	\$1,175.69	\$13,031.98	2.08%
8220SL - TWO-LITE SLIDER	1	\$891.77	\$68.07	2.08%
8510CS - CASEMENT	1	\$0.00	\$87.47	2.08%
8660DH - DOUBLE HUNG with PUR	7	\$3,509.05	\$48,483.93	14.58%
PW3000 - 3000 SERIES PICTURE WINDOW	3	\$1,653.52	\$0.00	6.25%
TWINDHCF - Continuous Frame Twin Double Hung	1	\$1,042.61	\$70.34	2.08%
Totals	48	\$23,023.03	\$129,129.12	100.00%

The following information is available on the 'RMA by Item' report:

- **Part** – Part ID and name. Links to the RMA by Disposition' report filtered for the part selected.
- **Qty** – The quantity of RMAs created for the part in the given date range
- **Total Price** – The total price of all of the RMAs charged against that part within the given date range.
- **Total Cost** – The total cost of the returned part for all of the RMAs within the given date range.
- **%** - Percentage of all RMAs within the given date range associated with the part.

RMA by Disposition

The 'RMA by Disposition' report displays RMA information per item and disposition within the specified date range. By default, the date range is one month from the current date based on creation date of the RMA. All other report filters are defaulted to {All}. This report is particularly helpful in identifying problem items by their disposition.

Users can access the 'RMA by Disposition' report in the following ways:

1. Select 'RMA' >> 'RMA by Disposition'.
2. In the 'RMA by Item' report, select the 'part' link.

Start Date	<input type="text" value="2/10/2017"/>	End Date	<input type="text" value="3/12/2019"/>	<input type="button" value="View Report"/>
Customer	{All}	Site	{All}	
Part	{All}	Disposition	{All}	
Reason Code	{All}	Receipt Disposition	{All}	
Receipt Reason Code	{All}			

1	of 1	100%	Find Next
---	------	------	-------------

Part	RMA Disposition	RMA Reason Code	Receipt Disposition	Receipt Reason Code	Qty	%
8000PW - PICTURE WINDOW	Repair Request	Missing part	Approved Repair	Missing part	1	3.45%
8100SH - SINGLE HUNG	Repair Request	Item not assembled properly	Approved Repair	Item not assembled properly	1	3.45%
8100SH - SINGLE HUNG	Replacement Request	Broke in delivery	Approved Replacement	Broke in delivery	1	3.45%
8220SL - TWO-LITE SLIDER	Repair Request	Broke in delivery	Approved Repair	Broke in delivery	1	3.45%
8220SL - TWO-LITE SLIDER	Repair Request	Item not assembled properly	Approved Repair	Item not assembled properly	1	3.45%
8220SL - TWO-LITE SLIDER	Replacement Request	Item not as ordered	Approved Replacement	Item not as ordered	1	3.45%
8510CS - CASEMENT	Repair Request	Broke in delivery	Approved Repair	Broke in delivery	3	10.34%
8510CS - CASEMENT	Repair Request	Item not assembled properly	Approved Repair	Item not assembled properly	2	6.90%
8510CS - CASEMENT	Replacement Request	Broke in delivery	Approved Replacement	Broke in delivery	1	3.45%
8510CS - CASEMENT	Replacement Request	Item not as ordered	Approved Replacement	Item not as ordered	1	3.45%
8510CS - CASEMENT	Replacement Request	Item not assembled properly	Approved Replacement	Item not assembled properly	1	3.45%
8510CS - CASEMENT	Replacement Request	Missing part	Approved Replacement	Missing part	3	10.34%
8520AW - AWNING	Replacement Request	Broke in delivery	Approved Replacement	Broke in delivery	1	3.45%
8660DH - DOUBLE HUNG	Repair Request	Broke in delivery	Approved Repair	Broke in delivery	1	3.45%
8660DH - DOUBLE HUNG	Repair Request	Item not assembled properly	Approved Repair	Item not assembled properly	4	13.79%
8660DH - DOUBLE HUNG	Repair Request	Missing part	Approved Repair	Missing part	1	3.45%
8660DH - DOUBLE HUNG	Replacement Request	Broke in delivery	Approved Replacement	Broke in delivery	2	6.90%
8660DH - DOUBLE HUNG	Replacement Request	Item not as ordered	Approved Replacement	Item not as ordered	1	3.45%
8660DH - DOUBLE HUNG	Replacement Request	Missing part	Approved Replacement	Missing part	2	6.90%
Totals					29	100.00%

The following filters are available on the 'RMA by Disposition' report:

- **Customer** – Filters to an individual customer's RMAs and dispositions
- **Site** – Filters to an individual customer site. (Only available when a specific customer is selected).
- **Part** – Filters to a specific part to allow for users to identify all dispositions for the specific part.
- **Disposition** – Filters to a specific disposition set at RMA entry to allow for users to identify all parts with the disposition.
- **Reason Code** – Filters to the original reason code specified on the RMAs.
- **Reception Disposition** – Filters to a specific disposition set at RMA receipt to allow for users to identify all parts with the disposition.
- **Receipt Reason Code** – Filters to the reason code set at receipt entry for the RMAs.

The following information is available on the 'RMA by Disposition' report:

- **Part** – Part ID and name.
- **RMA Disposition** – The disposition given to the part during RMA entry
- **RMA Reason Code** – The reason code given to the part during RMA entry
- **Receipt Disposition** – The disposition given to the part during RMA receipt entry
- **Receipt Reason Code** – The reason code given to the part during RMA receipt entry
- **Qty** – The quantity of RMAs created for the part and dispositions in the given date range
- **%** - Percentage of all RMAs within the given date range associated with the part and dispositions.

RMA by Status

The 'RMA by Status' report displays the RMA status and details for each RMA created within the specified date range. By default, the date range is one month from the current date based on creation date of the RMA. Customer, Site, and Status are all defaulted to {All}. This report is particularly helpful in identifying the status and status detail of each RMA, as well as timing.

To access this report, select 'RMA' >> 'RMA by Status'.

Start Date: 2/10/2017 End Date: 3/12/2019 View Report

Customer: {All} Site: {All}

Status: {All}

1 of 1 100% Find | Next

RMA by Status

Start Date: 2/10/2017 End Date: 3/12/2019 Location: {All}

Customer: {All} Site: {All}

RMA	Status	Details	Date	Closed Date	Turnaround Time	Expiration Date
35	Released	This RMA has been entered and approved. Some items have not yet been received.	2/23/2017			3/25/2017
36	Released	This RMA has been entered and approved. Some items have not yet been received.	3/3/2017			4/2/2017
37	Released	This RMA has been entered and approved. Some items have not yet been received.	3/3/2017			4/2/2017
38	Closed	This RMA has been closed.	3/3/2017	9/7/2017	188	4/2/2017
39	Released	This RMA has been entered and approved. All items have been received. 1 pickup order(s) have been created.	3/3/2017			4/2/2017
40	Released	This RMA has been entered and approved. Some items have not yet been received. 1 pickup order(s) have been created.	3/29/2017			4/28/2017
41	Released	This RMA has been entered and approved. Some items have not yet been received.	5/25/2017			6/24/2017
42	Released	This RMA has been entered and approved. All items have been received.	5/25/2017			6/24/2017
43	Released	This RMA has been entered and approved. Some items have not yet been received.	5/25/2017			6/24/2017
44	Closed	This RMA has been closed.	9/7/2017	10/13/2017	36	10/7/2017

The following information is available on the 'RMA by Status' report:

- **RMA** – The RMA number. Links to the 'RMA Status' report.
- **Status** – Shows whether the RMA is On Hold, Available, Released, or Closed.
- **Details** – Shows details associated with the RMA's status.
- **Date** – Date the RMA was created
- **Closed Date** – Date the RMA was fully closed
- **Turnaround Time** – Number of days between the created date and closed date of the RMA
- **Expiration Date** – Date the RMA will be considered expired. Shows in red if the expiration date has passed and the RMA has not closed.

RMA Status

The 'RMA Status' report provides detailed information about an RMA. This report is helpful when relaying the status and all related information about a specific RMA to a customer.

Users can access the report by selecting the RMA number link on the 'RMA by Status' report.

RMA Status				
RMA OPEN				
RMA:	57	RMA Date:	3/12/2019	Customer Ref:
Customer:	Atlantic Installers	Expiration Date:	4/11/2019	Contact:
Site:	Atlantic Installers	Entered By:	Fenetech Admin	
Item	Qty	Order-Item	Part	Size
1	1	8678-1	8660DH - DOUBLE HUNG	32 1/2 W X 48 1/2 H
Replacement Request, BOD - Broke in delivery, Pickup, Return to Customer, Require Inspection, Replace Method: On RMA Release, Credit Method: On RMA Release				
Item	Qty	Order-Item	Part	Size
2	1	8555-1	8220SL - TWO-LITE SLIDER	50 W X 50 H
Replacement Request, BOD - Broke in delivery, Pickup, Return to Customer, Require Inspection, Replace Method: On RMA Release, Credit Method: On RMA Release				
Item	Qty	Order-Item	Part	Size
3	1	8555-2	DH-PW-DH - Double Hung - Picture Window - Double Hung	90 W X 48 H
Replacement Request, BOD - Broke in delivery, Pickup, Return to Customer, Require Inspection, Replace Method: On RMA Release, Credit Method: On RMA Release				
Related Orders				
Date	Order	Order Type		
3/12/2019	8555-1	Order		
3/12/2019	8555-2	Credit		
3/12/2019	8555-3	Pickup		
3/12/2019	8678-1	Order		
3/12/2019	8678-2	Credit		
3/12/2019	8678-3	Pickup		
3/12/2019	8555-4	Order		
3/12/2019	8555-5	Credit		

Header Information

- **RMA** – The RMA number.
- **Customer** – The customer associated with the RMA.
- **Site** – The customer’s site.
- **RMA Date** – Date the RMA was created.
- **Expiration Date** – Date the RMA will be considered expired.
- **Customer Ref** – Customer reference information put in the RMA at RMA Entry.
- **Contact** – The customer contact associated with the RMA.
- **Entered By** – The associate who entered the RMA on behalf of the customer.

Grid Information

- **Item** – The line item number.
- **Qty** – The number of units being returned for the line item.
- **Order-Item** – The order number and line item number of the original order.
- **Part** – The part ID and number.
- **Size** – The ordered size of the part (can be call size or width x height x thickness).

Related Orders Information

- **Date** – Order date.
- **Order** – The order number. Links to the ‘Order Status’ report.
- **Order Type** – The type of order that was created from the RMA: Pickup, Credit, or Order.

RMA Credit vs Non-Credit

The ‘RMA Credit vs. Non-Credit’ report displays the number of credit and non-credit parts for each RMA created within the specified date range. By default, the date range is one month from the current date based on creation date of the RMA. This report is particularly helpful in identifying the number of RMAs that are resulting in credits to the customers.

To access this report, select 'RMA' >> 'RMA Credit vs Non Credit'.

Start Date: 7/3/2023	End Date: 7/24/2023
Customer: {All}	Site: {All}
	Currency: Canadian Dollar

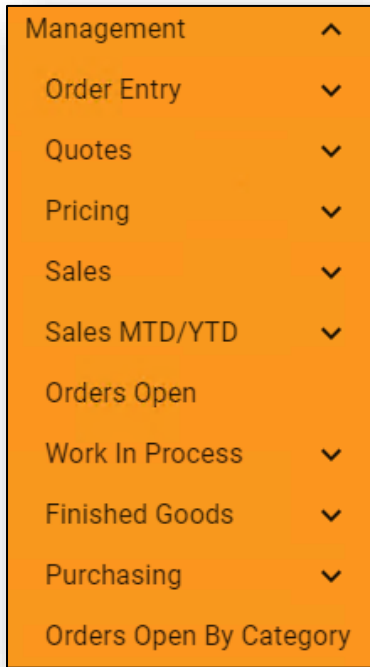
RMA Credit vs Non Credit							
Start Date: 7/3/2023	End Date: 7/24/2023	Location: {All}					
Customer: {All}	Site: {All}						
Date	RMA	Credit Qty	Credit Price	Credit Cost	Non Credit Qty	Non Credit Price	Non Credit Cost
7/20/2023	155	1	\$750.88	\$24.22	0	\$0.00	\$0.00
7/20/2023	156	0	\$0.00	\$0.00	1	\$1,410.83	\$13,031.98
7/21/2023	157	5	\$678.29	\$127.34	1	\$339.14	\$24.92
7/21/2023	158	2	\$1,638.42	\$16,611.83	0	\$0.00	\$0.00
7/21/2023	159	1	\$750.88	\$24.22	0	\$0.00	\$0.00
7/24/2023	160	0	\$0.00	\$0.00	0	\$0.00	\$0.00
7/24/2023	161	2	\$1,638.42	\$16,611.83	0	\$0.00	\$0.00
7/24/2023	162	6	\$4,639.66	\$33,223.67	0	\$0.00	\$0.00
7/24/2023	163	1	\$750.88	\$24.22	0	\$0.00	\$0.00
Totals		18	\$10,847.42	\$66,647.32	2	\$1,749.97	\$13,056.89

The following information is available on the 'RMA Credit vs Non Credit' report:

- **Date** – Date the RMA was created
- **RMA** – The RMA number. Links to the 'RMA Status' report.
- **Credit Qty** – Number of units on the RMA that will receive credit
- **Credit Price** – The total price of the credits that will be issued for the RMA
- **Credit Cost** - The cost of the units being credited in the RMA
- **Non-Credit Qty** – Number of units on the RMA that will not receive credit
- **Non-Credit Price** – The total price of the unit that will not receive credit for the RMA
- **Non-Credit Cost** - The cost of the units not being credited in the RMA

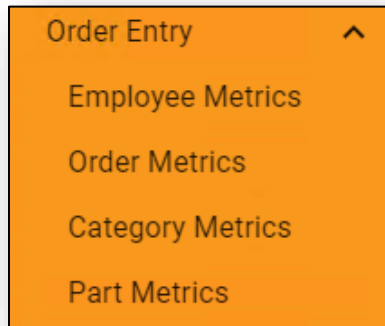
Management

This section provides management tools to evaluate financial aspects of the company such as sales stats, employee performance, and monetary value of orders in production.



Order Entry

The 'Order Entry' reports can be accessed by going to 'Management' >> 'Order Entry' and selecting 'Employee Metrics', 'Order Metrics', 'Category Metrics', or 'Part Metrics'.



Employee Metrics

The 'Order Entry Employee Metrics' report displays orders of each type entered by each employee within the specified date range. It includes monthly and yearly totals. By default, the report generates for the last 7 days for the type 'Order' selected.

To access this report, select 'Management' >> 'Order Entry' >> 'Employee Metrics'.

Start Date: 8/3/2023 End Date: 10/12/2023

Type: Order

Currency: Canadian Dollar

1 of 1 100%

Order Entry Employee Metrics

Start Date: 8/3/2023 End Date: 10/12/2023 Order Type(s): Order
Location: MAIN

2023

Month	Employee	Order Type	Total	Subtotal
October	Fenotech Admin	Order	1	\$331.40
	Fenotech Admin Totals		1	\$331.40
	Robertson, Chuck	Order	28	\$16,623.72
	Robertson, Chuck Totals		28	\$16,623.72
October Totals			29	\$16,955.12
2023 Totals			29	\$16,955.12

The following information is available on the 'Order Entry Employee Metrics' report:

- **Year** – Employee data grouped by year.
- **Month** – Employee data grouped by month.
- **Employee** – Personnel responsible for entering the order.
- **Order Type** – Type of order entered. 'Order', 'Quote', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'. 'Type' filter allows the report to be filtered to only show certain order types, but may also check (Select All) for all types to show.
- **Total** – Number of orders of that type entered by that employee.
- **Subtotal** – Monetary value of the total orders entered.

Order Metrics

The 'Order Entry Order Metrics' report displays all orders entered over a date range with monthly and yearly totals. This report helps to show which customers are placing orders through which employees, what kind of orders are generally being placed, and the sales numbers for the orders. By default, the report generates for the last 7 days with the type 'Order' selected.

To access this report, select 'Management' >> 'Order Entry' >> 'Order Metrics'.

Start Date: 4/17/2023 End Date: 4/30/2023

Type: Order

Currency: Canadian Dollar

1 of 1 100% Find | Next

Order Entry Order Metrics

Start Date: 4/17/2023 End Date: 4/30/2023 Order Type(s): Order
Location: MAIN

2023

Month	Employee	Order	Date	Type	Customer	Contact	Customer Ref.	Salesperson	Subtotal	Items
April	Jaba, Swapnil	432	4/17	Order	ABC Windows			Zurcher, Dylan	\$2,877.55	5
		436	4/18	Order	ABC Windows			Zurcher, Dylan	\$0.00	1
		10104	4/18	Order	Atom Annealing				\$13,586.01	1
		437	4/19	Order	ABC Windows			Zurcher, Dylan	\$18,049.63	2
		438	4/19	Order	ABC Windows			Zurcher, Dylan	\$34,657.81	11
		10105	4/19	Order	Design Zone				\$0.00	1
		440	4/21	Order	ABC Windows			Zurcher, Dylan	\$0.00	0
		10109	4/21	Order	Design Zone				\$7,936.75	3
	Jaba, Swapnil Totals	8							\$77,107.75	24
April Totals		8							\$77,107.75	24
2023 Totals		8							\$77,107.75	24



The following information is available on the 'Order Entry Order Metrics' report:


- **Year** – Orders grouped by year.
- **Month** – Orders grouped by month within year.
- **Employee** – Person responsible for entering the orders.
- **Order** – Order number. Links to the 'Order Status' report.
- **Date** – Order date.
- **Type** – Order type. Either 'Order', 'Quote', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'. Type filter allows the report to be filtered to only show certain order types, but may also check (Select All) for all types to show.
- **Customer** – Customer name.
- **Contact** – Customer contact person.
- **Customer Ref.** – Additional identifying information about the customer.
- **Salesperson** – Person responsible for making the sale.
- **Subtotal** – Subtotal of the order.
- **Items** – Number of items in the order. Items highlighted in yellow denote that an order was entered by the employee, but no line items were entered.








Category Metrics

The 'Order Entry Category Metrics' report displays orders entered within the selected date range by category and order type. Because it's broken down by category each record is a collection of line items not necessarily full orders. This helps to understand which categories are being ordered frequently. The report defaults to generate for the last 7 days.

To access this report, select 'Management' >> 'Order Entry' >> 'Category Metrics'.

Start Date: 10/5/2023  End Date: 10/12/2023 

Currency: Canadian Dollar 

1 of 1     100%   

Order Entry Category Metrics

Start Date: 10/5/2023 End Date: 10/12/2023 Location: MAIN

Date	Category	Type	Subtotal
10/5/2023	8000 Series Windows	Order	\$7,813.64
10/5/2023	Misc	Order	\$4,154.95
10/5/2023	Misc Building Materials	Order	\$95.89
10/5/2023	TEST PARTS	Order	\$859.55
			\$12,924.02
10/6/2023	8000 Series Windows	Order	\$3,400.71
10/6/2023	TEST PARTS	Order	\$337.63
			\$3,738.34
			\$16,662.36

The following information is available on the 'Order Entry Category Metrics' report:

- **Date** – Date of the line item(s).
- **Category** – Category of the line item(s).
- **Type** – Type of order the line item(s) came from, either 'Order', 'Quote', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'.
- **Subtotal** – Monetary value of the line item(s).

Part Metrics

The 'Order Entry Part Metrics' report displays parts placed on orders within the selected date range by order type and order status. This report helps to understand which parts are being ordered frequently. The report defaults to generate for the last 7 days.

To access this report, select 'Management' >> 'Order Entry' >> 'Part Metrics'.

Start Date: 10/5/2023 End Date: 10/6/2023
 Currency: Canadian Dollar

1 of 1 100%

Order Entry Part Metrics

Start Date: 10/5/2023 End Date: 10/6/2023 Location: MAIN

Type	Status	Part	Qty	Subtotal
Order	Available	8000PW - PICTURE WINDOW	2	\$818.66
		8100SH - SINGLE HUNG	4	\$1,816.90
		FLTSUR - FLAT SURCHARGE	10	\$50.03
		SILICONE - SILICONE	10	\$95.89
		SURCHARGE - SURCHARGE	4	\$181.67
		SURCHARGE BY OUNCE - Surcharge by Ounce	4	\$2,504.95
		SURCHARGE BY POUND - Surcharge by Pound	4	\$156.98
		SurchargeRegTest - Test surcharge	1	\$12.00
		testSurcharge - test surcharge	5	\$254.79
Total			44	\$5,891.88
	On Hold	8100SH - SINGLE HUNG	2	\$1,004.14
		SURCHARGE - SURCHARGE	2	\$100.42
		SURCHARGE BY OUNCE - Surcharge by Ounce	2	\$1,367.90
		SURCHARGE BY POUND - Surcharge by Pound	2	\$85.75
		testSurcharge - test surcharge	2	\$110.45
Total			10	\$2,668.66
	Released	8000PW - PICTURE WINDOW	15	\$7,562.64
		testSurcharge - test surcharge	11	\$831.95
Total			26	\$8,394.59
Report Total			80	\$16,955.12

The following information is available on the 'Order Entry Part Metrics' report:

- **Type** – Type of order, either 'Order', 'Quote', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'.
- **Status** – Status of the line item(s) for that part grouped by 'Order Type'.
- **Part** – Detailed description of the part.
- **Quantity** – Total number of parts ordered. Grouped by 'Order Type' and 'Status'.
- **Subtotal** – Dollar amount of the parts ordered.
- **Total** – Both total quantity and total dollar amount. Grouped by 'Order Type' and 'Status'.
- **Report Total** – Total quantity and dollar amount of all parts displayed.

Quotes

The 'Quotes' reports can be accessed selecting 'Management' >> 'Quotes' and selecting 'Quote History' or 'Quote Conversion'.

Quote History

The 'Quotes History' report displays quotes that have been entered over a date range and the dollar amount each quote will generate. This helps in determining the number of quotes and status of each quote for a given period of time. By default, the report generates for the last 7 days for all salespersons, customers, and sites.

To access this report, select 'Management' >> 'Quotes' >> 'Quote History'.

Start Date: 4/1/2023 End Date: 5/5/2023
 Salesperson: {All} Customer: {All}
 Site: {All} Currency: Canadian Dollar

1 of 1 100% Find | Next

Quotes History

Start Date: 4/1/2023 End Date: 5/5/2023 Salesperson: {All} Location: MAIN
 Customer: {All} Site: {All}

Quote	Status	Date	Customer	Customer Ref.	Salesperson	Entered By	Subtotal
Q9	Available	4/7/2023	ABC Windows		Zurcher, Dylan	Jaba, Swapnil	\$13,534.21
10102	Available	4/13/2023	Fab Five Construction		Jones, Emily	Fenotech Admin,	\$625.09
Quotes							2
Total							\$14,159.30

The following information is available on the 'Quotes History' report:

- **Quote** – Alphanumeric identifier of the quote. Links to the 'Order Status' report.
- **Status** – The quote's status.
- **Customer** – Customer name.
- **Customer Ref.** – Additional Identifier of the customer.
- **Salesperson** – Personnel responsible for the sale.
- **Entered By** – Personnel responsible for entering the quote.
- **Subtotal** – Dollar amount of the quote.
- **Quotes** – Total number of quotes for the specified date range and filters indicated.
- **Total** – Total dollar amount of all quotes for the specified date range and filters indicated.

Quote Conversion

The 'Quote Conversion' report displays the number and value of quotes, entered within a specific date range, that have been converted to orders by salesperson. By default, the report generates for the last 7 days for all salespersons.

To access this report, select 'Management' >> 'Quotes' >> 'Quote Conversion'.

Start Date: 5/2/2022 End Date: 7/15/2023
 Salesperson: {All} Currency: Canadian Dollar

1 of 1 100% Find | Next

Quote Conversion

Start Date: 5/2/2022 End Date: 7/15/2023 Location: MAIN
 Salesperson(s): {All}

Salesperson	Qty Entered	Value	Qty Converted	Converted Value	Conversion %
Zurcher, Dylan	1	\$13,534.21	1	\$13,534.21	100.00 %
White, Walter	1	\$76,217.31	0	\$0.00	0.00 %
Totals	2	\$89,751.51	1	\$13,534.21	50.00 %

The following information is available on the 'Quote Conversion' report:

- **Salesperson** – Salesperson responsible for securing the quote.
- **Qty Entered** – Quantity of units entered.

- **Value** – Dollar value of the units entered on the quote.
- **Qty Converted** – Quantity of the entered units that have been converted to an order.
- **Converted Value** – Dollar value that has been converted to an order.
- **Conversion %** – Percentage of quoted units that have been converted to orders.

Quote Reject History

The 'Quote Reject History' report shows quotes over a specified date range that have been rejected for any reason. If a reject comment exists, it can be found directly under the quote. By default, the report generates for the last 7 days for all salespersons, customers, sites, reject groups, and reject codes.

To access this report, select 'Management' >> 'Quotes' >> 'Quote Reject History'.

Quote	Date	Customer	Customer Ref.	Salesperson	Entered By	Reject	Subtotal
Q1147	10/9/2018	Wildcat Remodel		Jamison, Janice	Fenetech Admin,	UNABLE TO MEET TIMEFRAME	\$2,527.80
Q1148	10/9/2018	Michelle Milan		Piscitelli, Tony	Fenetech Admin,	UNABLE TO MEET TIMEFRAME	\$1,216.84
Q1150	10/9/2018	Wildcat Remodel		Jamison, Janice	Fenetech Admin,	PRICE TOO HIGH	\$2,527.80
Q1151	10/9/2018	Windy City Construction		White, Walter	Fenetech Admin,	FINANCE ISSUES	\$24,934.00
Q1153	10/9/2018	Fab Five Construction		White, Walter	Fenetech Admin,	UNABLE TO MEET TIMEFRAME	\$5,050.62
Q1155	10/9/2018	Wildcat Remodel		Jamison, Janice	Fenetech Admin,	FINANCE ISSUES	\$2,527.80
Quotes:							6
Total:							\$38,784.86

The following information is available on the 'Quote Reject History' report:

- **Quote** – Original quote of the rejected part.
- **Date** – Date the part was rejected.
- **Customer** – Customer name.
- **Customer Ref.** – Unique identifier of the customer.
- **Entered By** – Personnel responsible for entering the quote.
- **Reject** – Reason for rejection.
- **Subtotal** – Dollar amount of rejected portion.
- **Comments** – Any comments made regarding the rejected part.
- **Quotes** – Number of quotes rejected.
- **Total** – Total dollar amount from rejected units.

Pricing

'Pricing' reports outline all information regarding pricing, particularly discounts and exceptions. 'Pricing' reports can be accessed by going to 'Management' >> 'Pricing'. Select either 'Average Discount by Part' or 'Price Exceptions'.

Average Discount by Part

The 'Average Discount by Part' report shows the average list price, average price, average discount, and average cost of each part within the selected date range. This report only shows parts that have been invoiced with the invoice posted over the date range. By default, the report generates for the last 30 days.

To access this report, select 'Management' >> 'Pricing' >> 'Average Discount by Part'.

Average Discount by Part

Start Date: 2/3/2020 End Date: 3/4/2020 Location: {All}

Part	Qty	Average List Price	Average Price	Average Discount	Average Cost
PW3000-3000 SERIES PICTURE WINDOW	100	\$481.57	\$481.57	\$0.00	\$0.00
8800CA-CATHEDRAL PW	30	\$1,533.90	\$1,533.90	\$0.00	\$24.54
DH3000-3000 SERIES DOUBLE HUNG	20	\$627.40	\$627.40	\$0.00	\$0.00
PurchasedOrdered-	10	\$30.00	\$30.00	\$0.00	\$0.00

The following information is available on the 'Average Discount by Part' report:

- **Part** – Part identifier.
- **Qty** – Number of times that part has been invoiced over the particular date range.
- **Average List Price** – Average price prior to discounts.
- **Average Price** – Average actual price.
- **Average Discount** – Average discount the customer receives off the list price.
- **Average Cost** – Average cost of the part over this time period.

Price Exceptions

The 'Price Exceptions' report displays instances where a price differed from the standard price over a date range. This report is grouped by employee and customer. This helps to improve pricing exceptions for the future by determining if changes may need made to price books. By default, the report generates for the last 30 days.

To access this report, select 'Management' >> 'Pricing' >> 'Price Exceptions'.

Start Date: 7/21/2023 End Date: 7/22/2023 Currency: Canadian Dollar

Price Exceptions

Start Date: 7/21/2023 End Date: 7/22/2023 Location: MAIN

Swapnil Jaba

8 ABC Windows

Order	Date	Item	Part	Size	Qty	Std. Price	Price	Diff.	Diff. %	Total Diff.
480-4	7/21/2023	1	IGU-INSULATED GLASS UNIT	32 1/2 W X 44 1/2 H	1	\$0.00	\$0.00	\$0.00	0.00 %	\$0.00
		2	8100SH-F-SINGLE HUNG FRAME	36 W X 60 H	1	(\$90.00)	\$0.00	\$90.00	-100.00 %	\$90.00
		3	SurchargeRegTest-Test surcharge		1	(\$12.00)	(\$12.00)	\$0.00	0.00 %	\$0.00
		4	SURCHARGE-SURCHARGE		1	(\$1.99)	(\$1.99)	\$0.00	0.00 %	\$0.00
						Std. Price	Price	Diff.	Diff. %	
Total Sales Greater than Standard Price:						-\$108.00	\$0.00	\$108.00	-100.00 %	
Total Sales Less than Standard Price:						\$0.00	\$0.00	\$0.00	100.00 %	
Total Sales at Standard Price:						\$71,496.94	\$71,496.94	\$0.00	0.00 %	
Total Sales:						\$71,372.15	\$71,480.15	\$108.00	0.15 %	

The following information is available on the 'Price Exceptions' report:

- **Employee Name** – Name of the employee responsible for entering the order.
 - **Customer ID** – Customer ID number.
 - **Customer** – Customer name.
 - **Order** – Order number. Links to the 'Order Status' report.
 - **Date** – Date the order was entered.
 - **Item** – Line item number.
 - **Part** – Identifier of the part.

- **Size** – Size of the part.
 - **Qty** – Number of parts.
 - **Std. Price** – Standard price without the pricing exception.
 - **Price** – Actual price with the pricing exception.
 - **Diff.** – Difference between standard price and price.
 - **Diff. %** – Percentage change from standard price to price.
 - **Total Diff.** – The total difference between the standard price and the price.
- **Total Sales Greater than the Standard Price** – Total of the sales where the price was greater than the standard price.
 - **Std. Price** – Sum of the standard price for these line items.
 - **Price** – Sum of the actual price for these line items.
 - **Diff.** – Sum of the difference between standard price and price for these line items.
 - **Diff. %** – Percentage change from the standard price to the price for these line items.
 - **Total Sales Less than the Standard Price** – Total of the sales that were less than the standard price.
 - **Std. Price** – Sum of the standard price for these line items.
 - **Price** – Sum of the actual price for these line items.
 - **Diff.** – Sum of the difference between standard price and price for these line items.
 - **Diff. %** – Percentage change from the standard price to the price for these line items.
 - **Total Sales of the Standard Price** – Total sales of items whose price matched the standard price.
 - **Std. Price** – Sum of the standard price for these line items.
 - **Price** – Sum of the actual price for these line items.
 - **Diff.** – Sum of the difference between standard price and price for these line items.
 - **Diff. %** – Percentage change from the standard price to the price for these line items.
 - **Total Sales** – Total sales.
 - **Std. Price** – Sum of the standard price for all line items in this time period.
 - **Price** – Sum of the actual price for all line items in this time period.
 - **Diff.** – Sum of the difference between standard price and price for all line items in this time period.
 - **Diff. %** – Percentage change from the standard price to the price for all line items in this time period.

Sales

The 'Sales' reports detail information regarding all sales at the user's facilities. These reports can be accessed by going to 'Management' >> 'Sales'. The following sales reports are featured:

By Category

The 'Sales by Category' report displays sales, grouped by 'Product Category', for invoices posted within the given date range and the percentage of the total sales that come from each category. By default, the report generates for the last 30 days.

To access this report, select 'Management' >> 'Sales' >> 'By Category'.

Start Date: End Date:
 Currency:

1 of 1 100%

Sales by Category

Start Date: 6/5/2023 End Date: 10/12/2023 Location: MAIN

Category	Qty	Total Sales	Total Cost	Margin	Margin %	Sales %
I Doors - Double	13	\$69,451.23	\$260.00	\$69,191.23	99.63%	69.55%
I 8000 Series Windows	45	\$17,497.00	\$1,958.79	\$15,538.22	88.81%	17.52%
I Misc	2	\$6,136.20	\$0.00	\$6,136.20	100.00%	6.14%
I Bay/Bow	2	\$5,436.43	\$209.02	\$5,227.42	96.16%	5.44%
I TEST PARTS	2	\$926.72	\$0.00	\$926.72	100.00%	0.93%
I {None}	1	\$362.75	\$0.00	\$362.75	100.00%	0.36%
I Doors - Storm Double	1	\$52.80	\$0.00	\$52.80	100.00%	0.05%
I DEPOSITS	4	\$0.00	\$0.00	\$0.00	0.00%	0.00%
Totals	70	\$99,863.14	\$2,427.81	\$97,435.33	97.57%	100.00%

Additionally, the following information is detailed in the 'Sales by Category' report:

- **I** – Links to the 'Sales by Item' report for that particular category.
- **Category** – Product category.
- **Quantity** – Number of units sold from the category.
- **Total Sales** – Income from the sales for the category.
- **Total Cost** – Amount of the cost from the sales for the category.
- **Margin** – Profit (Sales – Cost) from the sales for the category.
- **Margin %** – Percentage of the sales (income) that is profit for the category.
- **Sales %** – Percentage of the sales amount that came from the category.
- **Totals** – Totals of each of the previous columns.

By Customer

The 'Sales by Customer' report displays sales, cost, and margin information, by customer, for invoices posted within the given date range. By default, the report generates for the last 30 days, and has No selected for group sites.

To access this report, select 'Management' >> 'Sales' >> 'By Customer'.

Start Date: End Date:
 Customer Group: Group Sites:
 Currency:

1 of 1 100%

Sales by Customer

Start Date: 4/3/2023 End Date: 10/27/2023 Location: MAIN Customer Group: {All}

Customer	Qty	Total Sales	Total Cost	Margin	Margin %	Sales %
I O IN ABC Windows[10]	12	\$5,433.74	\$274.09	\$5,159.66	94.96%	70.14%
I O IN Design Zone[33]	16	\$2,313.20	\$401.21	\$1,911.99	82.66%	29.86%
I O IN Atom Annealing	1	\$0.00	\$134.13	-\$134.13	0.00%	0.00%
Totals	29	\$7,746.94	\$809.43	\$6,937.51	89.55%	100.00%

The following information is available in the 'Sales by Customer' report:

- **I** – Links to the 'Sales by Item' report for the selected customer.

- **O** – Links to the ‘Sales by Option’ report for the selected customer.
- **IN** – Links to the ‘Sales by Invoice’ report for the selected customer.
- **Customer** – Customer name.
- **Quantity** – Number of units sold to the customer.
- **Total Sales** – Income from the sales to the customer.
- **Total Cost** – Amount of cost from the sales to the customer.
- **Margin** – Profit (Sales – Cost) from the sales to the customer.
- **Margin %** – Percentage of the sales (income) that is profit for the customer.
- **Sales %** – Percentage of the sales amount that came from the customer.
- **Total** – Total of the previous columns.

By Invoice

The ‘Sales by Invoice’ report provides a breakdown of the impact on sales from each individual invoice posted between the given date range. By default, the report generates for the last 30 days with the salesperson, customer, and site filters set to {All}.

Users can access the ‘Sales by Invoice’ report in the following ways:

1. Select ‘Management’ >> ‘Sales’ >> ‘By Invoice’.
2. In the ‘Sales by Customer’ report, select the ‘IN’ link.
3. In the ‘Sales by Salesperson’ report, select the ‘IN’ link.

Start Date:	12/4/2023	End Date:	1/24/2024	Salesperson:	{All}
Customer Group:	{All}	Customer:	{All}	Site:	{All}
Currency:	Canadian Dollar				

1	of 1	100%
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Sales by Invoice

Start Date: 12/4/2023 End Date: 1/24/2024 Salesperson: {All} Location: MAIN
Customer: {All} Site: {All} Customer Group: {All}

Invoice	Order	Qty	Total Sales	Total Cost	Margin	Margin %	Sales %
219	11550	6	\$1,486.42	\$277.47	\$1,208.94	81.33%	20.01%
220	11551	7	\$2,643.04	\$507.62	\$2,135.42	80.79%	35.58%
221	11553	3	\$499.96	\$41.59	\$458.37	91.68%	6.73%
222	11552	3	\$714.27	\$44.25	\$670.02	93.80%	9.61%
223	11554	3	\$385.65	\$55.49	\$330.16	85.61%	5.19%
224	11555	3	\$416.19	\$83.04	\$333.15	80.05%	5.60%
225	11557	2	\$492.22	\$32.79	\$459.43	93.34%	6.63%
226	11558	5	\$776.81	\$40.30	\$736.51	94.81%	10.46%
227	11559	2	\$7.20	\$0.00	\$7.20	100.00%	0.10%
228	11561	2	\$7.20	\$0.00	\$7.20	100.00%	0.10%
Totals		36	\$7,428.95	\$1,082.56	\$6,346.39	85.43%	100.00%

The following information is available on the ‘Sales by Invoice’ report:

- **Invoice** – Invoice identifier. Links to the ‘Invoice History’ report.
- **Order** – Identifier of the order. Links to the ‘Order Status’ report.
- **Qty** – Number of units on the invoice.
- **Total Sales** – Income from the sales on the invoice.
- **Total Cost** – Amount of cost from the sales on the invoice.
- **Margin** – Profit (Sales – Cost) from the sales on the invoice.
- **Margin %** – Percentage of the sales (income) that is profit on the invoice.
- **Sales %** – Percentage of the sales amount that came from the items on the invoice.
- **Totals** – Totals of the previous columns.

By Item

The 'Sales by Item' report provides a breakdown on the impact on sales numbers from each individual part that can be found on an invoice that was posted within the give date range. By default, the report generates for the last 30 days with the category, customer, and site filters set to {All}.

Users can access the 'Sales by Item' report in the following ways:

1. Select 'Management' >> 'Sales' >> 'By Item'.
2. In the 'Sales by Category' report, select the 'I' link.
3. In the 'Sales by Customer' report, select the 'I' link.

Item	Qty	Total Sales	Total Cost	Margin	Margin %	Sales %
SURCHARGE BY OUNCE-Surcharge by Ounce	1	\$696.48	\$0.00	\$696.48	100.00%	54.27%
8000PW-PICTURE WINDOW	1	\$481.22	\$32.79	\$448.43	93.19%	37.49%
8100SH-SINGLE HUNG	1	\$50.00	\$40.30	\$9.70	19.41%	3.90%
SURCHARGE-SURCHARGE	1	\$25.00	\$0.00	\$25.00	100.00%	1.95%
SILICONE-SILICONE	2	\$12.00	\$0.00	\$12.00	100.00%	0.93%
33184SURCHARGE-33184	1	\$11.00	\$0.00	\$11.00	100.00%	0.86%
PTSTUP-CUSTOM PAINT SETUP	1	\$5.00	\$0.00	\$5.00	100.00%	0.39%
BWSUR	2	\$2.40	\$0.00	\$2.40	100.00%	0.19%
SURCHARGE BY POUND-Surcharge by Pound	1	\$0.33	\$0.00	\$0.33	0.00%	0.03%
Totals	11	\$1,283.43	\$73.08	\$1,210.34	94.31%	100.00%

The following information is available on the 'Sales by Item' report:

- **Item** – Identifier of the part. Links to the 'Sales by Option' report for that particular item.
- **Qty** – Number of times this part has been sold.
- **Total Sales** – Income from the sales for this part.
- **Total Cost** – Amount of the costs incurred by the sales of the part.
- **Margin** – Profit (Sales – Cost) from the sales of the part.
- **Margin %** – Percentage of the sales (income) that is profit for this part.
- **Sales %** – Percentage of the sales amount that came from each part.

By Option

The 'Sales by Option' report provides a breakdown of the amount of sales that are generated with specific options, on invoices posted within the given date range, selected and the profit margins that come from those sales. By default, the report generates for the last 30 days with the all of the filters set to {All}.

Users can access the 'Sales by Option' report in the following ways:

1. Select 'Management' >> 'Sales' >> 'By Option'.
2. In the 'Sales by Item' report, select the 'Item' link.
3. In the 'Sales by Customer' report, select the 'O' link.
4. In the 'Sales by Option' report, select the 'P' link to view 'Sales by Option' for that specific option.

Start Date: 12/13/2023 End Date: 1/24/2024

Customer Group: {All} Customer: {All} Site: {All}

Part: {All} Part Suffix: {All} Option: {All}

Currency: Canadian Dollar

1 of 1

100%

Sales by Option

Start Date: 12/13/2023 End Date: 1/24/2024 Option: {All} Location: MAIN
 Customer: {All} Site: {All} Customer Group: {All}

Option	Qty	Total Sales	Sales %
P NF-NAIL FIN	2	\$41.35	54.21%
P ARG-ARGON GAS	2	\$28.03	36.75%
P HEADEX-HEAD EXPANDER	2	\$6.89	9.04%
P WH-WHITE	2	\$0.00	0.00%
P CLCL-CLEAR/CLEAR IG	2	\$0.00	0.00%
P EX-EXACT SIZE	2	\$0.00	0.00%
P NS-NO SCREEN	1	\$0.00	0.00%
P OV SHG-Solar Heat Gain Coefficient	1	\$0.00	0.00%
P OV UF-U-Factor	1	\$0.00	0.00%
P OV VT-Visible Transmittance	1	\$0.00	0.00%
Totals	16	\$76.28	100.00%

The following information is available on the 'Sales by Option' report:

- **P** – Links to the 'Sales by Option' report for that particular option. This will display a breakdown of the parts ordered that have the option rather than all options ordered.
- **OV** – Links to the 'Sales by Option Value' report for that particular option.
- **Option** – Description of the part's option.
- **Qty** – Number of units sold with that particular option selected.
- **Total Sales** – Income from the sales containing the option.
- **Sales %** – Percentage of the sales amount that came from units with the option selected.
- **Totals** – Sum of the previous columns.

By Option (for individual option)

The 'Sales by Option' report for an individual is option accessed by selecting the P link in the 'Sales by Option' report or by viewing the report for all options and selecting an option from the 'Option' filter. This shows all parts that were sold with the selected option.

Sales by Option

Start Date: 9/13/2015 End Date: 10/13/2015 Option: PLF - PYRAN PLATINUM F Location: PGC
 Customer: {All} Site: {All}

Part	Qty	Total Sales	Sales %
FR-316-FIRE RATED GLASS 3/16"	4	\$1,704.08	100.00%
Totals	4	\$1,704.08	100.00%

The information available in this report matches that available on the 'Sales by Option' report only it's grouped by part instead of option.

By Option Value

The 'Sales by Option Value' report outlines the sales resulting from option values, the "options within options" that exist in 'Order Entry', that can be found on invoices posted within the give date range. For example, if giving a customer a choice within an option has secured a sale, that information will be outlined in the 'Sales by Option Value' report. By default, the report generates for the last 30 days with the all of the filters set to {All}.

Users can access the 'Sales by Option Value' report in the following ways:

1. Select 'Management' >> 'Sales' >> 'By Option Value'.

2. In the 'Sales by Option' report, select the 'OV' link.

Start Date: 10/2/2023 End Date: 1/24/2024

Customer Group: {All} Customer: {All} Site: {All}

Category ID: {All} Part: {All} Part Suffix: {All}

Option: {All} Option Value: {All} Display Part: True False

Currency: Canadian Dollar

1 of 1

Sales by Option Value

Start Date: 10/2/2023 End Date: 1/24/2024 Location: MAIN Customer Group: {All}

Customer: {All} Site: {All}

Option	Option Value	Qty	Total Sales	Sales %
JAMBEX - JAMB EXTENSIONS	4 9/16	1	\$186.49	100.00%
SHG - Solar Heat Gain Coefficient	0.34	4	\$0.00	0.00%
UF - U-Factor	0.22	4	\$0.00	0.00%
VT - Visible Transmittance	0.47	4	\$0.00	0.00%
Totals		13	\$186.49	100.00%

The 'Sales by Option Value' report details the following information:

- **Part** – Detailed identifier of the part. Indicating 'True' in the filtering section will reveal the part identification; 'False' will hide the part identification.
- **Option** – Detailed identifier of the part's option.
- **Option Value** – Detailed identifier of the option's value, e.g., specific dimensions.
- **Qty** – Number of units with that option / option value.
- **Total Sales** – Income from the sales of the parts with the option / option value.
- **Sales %** – Percentage of the sales amount that came from the option value.

By Salesperson

The 'Sales by Salesperson' report displays a breakdown of the income and profit being generated from each salesperson over a date range. The information on this report represents the invoices posted within the given date range and assigned to each salesperson. By default, the report generates for the last 30 days.

To access this report, select 'Management' >> 'Sales' >> 'Sales by Salesperson'.

Start Date: 12/11/2023 End Date: 1/24/2024 Customer Group: {All}

Currency: Canadian Dollar

1 of 1

Sales by Salesperson

Start Date: 12/11/2023 End Date: 1/24/2024 Location: MAIN Customer Group: {All}

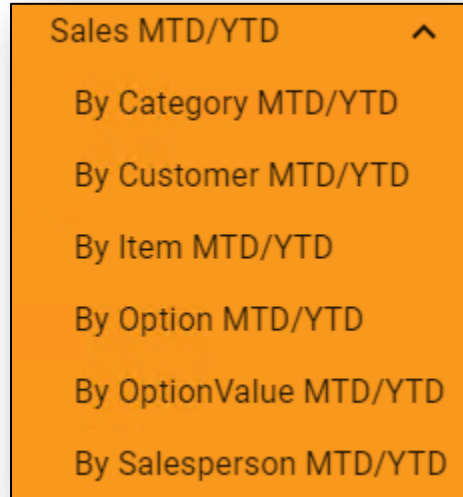
Salesperson	Qty	Total Sales	Total Cost	Margin	Margin %	Sales %
IN Jamison, Janice	16	\$4,545.65	\$868.14	\$3,677.51	80.90%	61.19%
IN {None}	17	\$2,497.65	\$158.93	\$2,338.72	93.64%	33.62%
IN curry, tom	3	\$385.65	\$55.49	\$330.16	85.61%	5.19%
Totals	36	\$7,428.95	\$1,082.56	\$6,346.39	85.43%	100.00%

The following information is available on the 'Sales by Salesperson report:

- **IN** – Links to the 'Sales by Invoice' report for that particular salesperson.
- **Salesperson** – Personnel responsible for the sale.

- **Qty.** – Number of units sold by the salesperson.
- **Total Sales** – Income from the person’s sales.
- **Total Cost** – Amount of the cost from the person’s sales.
- **Margin** – Profit (Sales – Cost) from the person’s sales.
- **Margin %** – Percentage of the person’s sales (income) that is profit.
- **Sales %** – Percentage of the sales amount that came from the person’s sales.
- **Totals** – Sum of the previous columns.

Sales MTD / YTD



By Category MTD / YTD

The ‘Sales by Category MTD / YTD’ report displays month-to-date and year-to-date sales figures grouped by product category. The information on this report reflects invoices that have been posted within the given date range. By default, the report generates for the current month and year based on the date the report is run.

To access this report, go to ‘Management’ >> ‘Sales MTD / YTD’ >> ‘By Category MTD / YTD’.

Date: 10/2/2023 Customer Group: {All} Currency: Canadian Dollar

1 of 1 100%

Sales by Category MTD/YTD
Date: 10/2/2023 Location: MAIN Customer Group: {All}

Category	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
Bay/Bow	\$0.00	\$0.00	0.00%	\$1,602.00	\$3,588.78	124.02%
8000 Series Windows	\$0.00	\$0.00	0.00%	\$27,520.27	\$1,734.58	-93.70%
Misc	\$0.00	\$0.00	0.00%	\$7,918.25	\$1,180.59	-85.09%
{None}	\$0.00	\$0.00	0.00%	\$1,369.70	\$59.70	-95.64%
{Charge Codes}	\$0.00	\$0.00	0.00%	\$389.00	\$0.00	-100.00%
Stacks & Mulls	\$0.00	\$0.00	0.00%	\$2,276.78	\$0.00	-100.00%
Totals	\$0.00	\$0.00	0.00%	\$41,076.00	\$6,563.66	-84.02%

The following information is available on the ‘Sales by Category MTD / YTD’ report:

- **I** – Link to the ‘Sales by Item MTD / YTD’ report.
- **Category** – Product Category.

- **MTD** – Amount of sales from the category for the selected month to date.
 - **Selected year** – The amount of sales (income) from the first of the month to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from the first of the month to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that sales from this category have increased 50% from the previous year over the same month.
- **YTD** – Amount of sales from the category for the selected year to date.
 - **Selected year** – The amount of sales (income) from January 1st to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from January 1st to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that sales from this category have increased 50% from the previous year at the selected date.

By Customer MTD / YTD

The 'Sales by Customer MTD / YTD' report displays month-to-date and year-to-date sales figures grouped by customer. The information on this report reflects invoices that have been posted within the given date range. By default, the report generates for the current month and year based on the date the report is run, and has No selected for the group sites filter.

To access this report, select 'Management' >> 'Sales MTD / YTD' >> 'By Customer MTD / YTD'.

Date: 11/30/2023 Customer Group: {All} Group Sites: No
 Currency: Canadian Dollar

1 of 1 100%

Sales by Customer MTD/YTD

Date: 11/30/2023 Location: MAIN Customer Group: {All}

Customer	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
I O Atlantic Installers[28]	\$0.00	\$22,728.89	100.00%	\$16,629.09	\$22,728.89	36.68%
I O Atom Annealing	\$0.00	\$13,230.16	100.00%	\$12,983.94	\$15,694.18	20.87%
I O Bird Construction[20]	\$0.00	\$15,681.61	100.00%	\$3,258.05	\$15,681.61	381.32%
I O ABC Windows[10]	\$0.00	\$0.00	0.00%	\$0.00	\$5,433.74	100.00%
I O Design Zone[33]	\$0.00	\$1,047.20	100.00%	\$0.00	\$3,360.40	100.00%
I O ABC Windows[8]	\$0.00	\$894.43	100.00%	\$3,635.52	\$1,036.32	-71.49%
I O Golden Oaks[52]	\$0.00	\$0.00	0.00%	\$0.00	\$988.03	100.00%
I O Dynamet Windows[DYN3]	\$0.00	\$744.31	100.00%	\$0.00	\$744.31	100.00%
I O Clear Canadian[45]	\$0.00	\$117.45	100.00%	\$1,362.40	\$117.45	-91.38%
I O AURORA-Location[MAIN]	\$0.00	\$0.00	0.00%	\$3,207.00	\$0.00	-100.00%
Totals	\$0.00	\$54,444.06	100.00%	\$41,076.00	\$65,784.94	60.15%

The following information is available on the 'Sales by Customer MTD / YTD' report:

- **I** – Links to the 'Sales by Item MTD / YTD' report.
- **O** – Links to the 'Sales by Option MTD / YTD' report.
- **Customer** – Customer name.
- **MTD** – Amount of sales from the customer for the selected month to date.
 - **Selected year** – The amount of sales (income) from the first of the month to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from the first of the month to the selected date for the previous year.

- **Comparison** – Percentage change in sales between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.
- **YTD** – Amount of sales from the customer for the selected year to date.
 - **Selected year** – The amount of sales (income) from January 1st to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from January 1st to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

By Item MTD / YTD

The 'Sales by Item MTD / YTD' report displays month-to-date and year-to-date figured grouped by part. The information on this report reflects invoices that have been posted within the given date range. By default, the report generates for the current month and year based on the date the report is run with all filters set to {All}.

Users can access the 'Sales by Item MTD / YTD' report in the following ways:

1. Select 'Management' >> 'Sales MTD / YTD' >> 'By Item MTD / YTD'.
2. In the 'Sales by Category MTD / YTD' report, select the 'I' link.
3. In the 'Sales by Customer MTD / YTD' report, select the 'I' link.

Sales by Item MTD/YTD							
Date: 3/30/2023 Location: MAIN Customer Group: {All}							
Item	MTD			YTD			
	2022	2023	Comparison	2022	2023	Comparison	
8000PW - PICTURE WINDOW	\$0.00	\$966.03	100.00%	\$1,086.36	\$966.03	-11.08%	
NSOTaxablePart	\$0.00	\$89.19	100.00%	\$0.00	\$89.19	100.00%	
NSONonTaxablePart	\$0.00	\$52.70	100.00%	\$0.00	\$52.70	100.00%	
33184SURCHARGE - 33184	\$0.00	\$22.00	100.00%	\$0.00	\$22.00	100.00%	
PTSTUP - CUSTOM PAINT SETUP	\$40.01	\$0.00	-100.00%	\$40.01	\$0.00	-100.00%	
SUR-SCUM	\$202.42	\$0.00	-100.00%	\$202.42	\$0.00	-100.00%	
SURCHARGE - SURCHARGE	\$160.61	\$0.00	-100.00%	\$160.61	\$0.00	-100.00%	
SURCHARGE BY OUNCE - Surcharge by Ounce	\$7,138.97	\$0.00	-100.00%	\$7,138.97	\$0.00	-100.00%	
SURCHARGE BY POUND - Surcharge by Pound	\$448.49	\$0.00	-100.00%	\$448.49	\$0.00	-100.00%	
8230SL - THREE-LITE SLIDER	\$3,211.87	\$0.00	-100.00%	\$3,211.87	\$0.00	-100.00%	
8660DH - DOUBLE HUNG	\$4,048.56	\$0.00	-100.00%	\$4,048.56	\$0.00	-100.00%	
Delivery	\$360.00	\$0.00	-100.00%	\$360.00	\$0.00	-100.00%	
Totals	\$15,610.93	\$1,129.92	-92.76%	\$16,697.29	\$1,129.92	-93.23%	

The following information is available on the 'Sales by Item MTD / YTD' report:

- **Item** – Identifier of the part. Links to the 'Sales by Option MTD / YTD' report.
- **MTD** – Amount of sales for the part for the selected month to date.
 - **Selected year** – The amount of sales (income) from the first of the month to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from the first of the month to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

- **YTD** – Amount of sales for the part for the selected year to date.
 - **Selected year** – The amount of sales (income) from January 1st to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from January 1st to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

By Option MTD / YTD

The 'Sales by Option MTD / YTD' report displays month-to-date and year-to-date sales figured grouped by options selected. The information on this report reflects invoices that have been posted within the given date range. By default, the report generates for the current month and year based on the date the report is run with all filters set to {All}.

Users can access the 'Sales by Option MTD / YTD' report in the following ways:

1. Select 'Management' >> 'Sales MTD / YTD' >> 'By Option MTD / YTD'.
2. In the 'Sales by Customer MTD / YTD' report, select the 'O' link.
3. In the 'Sales by Item MTD / YTD' report, select the 'Item' link.
4. In the 'Sales by Option MTD / YTD' report, select the 'P' link to view the report for that specific option.

Date:	<input type="text" value="3/30/2023"/>		Customer Group:	<input type="text" value="{All}"/>	Customer:	<input type="text" value="{All}"/>	Site:	<input type="text" value="{All}"/>
Part:	<input type="text" value="{All}"/>		Part Suffix:	<input type="text" value="{All}"/>		Option:	<input type="text" value="{All}"/>	
Currency:	<input type="text" value="Canadian Dollar"/>							

		<input type="text" value="1"/> of 1				<input type="text" value="100%"/>			<input type="text" value=""/>
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Sales by Option MTD/YTD

Date: 3/30/2023 Location: MAIN Customer Group: {All}

Option	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
P YES-Sure did	\$0.00	\$81.08	100.00%	\$0.00	\$81.08	100.00%
P NF-NAIL FIN	\$642.00	\$80.00	-87.54%	\$732.00	\$80.00	-89.07%
P NO-Sure didn't	\$0.00	\$48.65	100.00%	\$0.00	\$48.65	100.00%
P ARG-ARGON GAS	\$314.21	\$46.11	-85.33%	\$369.53	\$46.11	-87.52%
P HEADEX-HEAD EXPANDER	\$93.12	\$10.00	-89.26%	\$108.12	\$10.00	-90.75%
P LEGY-LOW-E/GREY IG	\$423.46	\$0.00	-100.00%	\$423.46	\$0.00	-100.00%
P FS-FULL SCREEN	\$38.69	\$0.00	-100.00%	\$38.69	\$0.00	-100.00%
P NS-NO SCREEN	-\$126.14	\$0.00	-100.00%	-\$126.14	\$0.00	-100.00%
Totals	\$1,385.33	\$265.84	-80.81%	\$1,545.65	\$265.84	-82.80%

The following information is available in the 'Sales by Option MTD / YTD' report:

- **P** – Links to the 'Sales by Option MTD / YTD' report for the individual option. This will display a breakdown of the parts ordered that have the option rather than all options ordered.
- **OV** – Links to the 'Sales by Option Value MTD / YTD' report.
- **Option** – Detailed description of the option applied to the item.
- **MTD** – Amount of sales containing this option for the selected month to date.
 - **Selected year** – The amount of sales (income) from the first of the month to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from the first of the month to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

- **YTD** – Amount of sales containing this option for the selected year to date.
 - **Selected year** – The amount of sales (income) from January 1st to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from January 1st to the selected date for the previous year.
 - **Comparison** – Percentage change in the sales between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

By Option MTD / YTD (for individual option)

The 'Sales by Option MTD / YTD' report for an individual option is accessed by selecting the [P](#) link in the 'Sales by Option MTD / YTD' report for the date indicated or by viewing the report for all options and selecting an option from the 'Option' filter.

Sales by Option MTD/YTD						
Date: 2/16/2015		Location:				
Part	MTD			YTD		
	2014	2015	Comparison	2014	2015	Comparison
P OV AI14-ANNEALED INSULATING 1/4"	\$0.00	\$105.60	100.00%	\$0.00	\$105.60	100.00%
Totals	\$0.00	\$105.60	100.00%	\$0.00	\$105.60	100.00%

The information available in this report matches that available on the 'Sales by Option MTD / YTD' report only it's grouped by part instead of option.

By Option Value MTD / YTD

The 'Sales by Option Value MTD / YTD' report displays month-to-date and year-to-date sales figured grouped by option values selected. The information on this report reflects invoices that have been posted within the given date range. By default, the report generates for the current month and year based on the date the report is run with all filters set to {All}.

Users can access the 'Sales by Option Value MTD / YTD' report in the following ways:

1. Select 'Management' >> 'Sales MTD / YTD' >> 'By Option Value MTD / YTD'.
2. In the 'Sales by Option MTD / YTD' report, select the 'OV' link.

Date:	12/21/2023	Customer Group:	{All}	Customer:	{All}	Site:	{All}
Category:	{All}	Part:	{All}	Part Suffix:	{All}	Option:	{All}
Option Value:	{All}	Option Value:	{All}	Display Part:	<input type="radio"/> True <input checked="" type="radio"/> False	Currency:	Canadian Dollar

Sales by Option Value MTD/YTD							
Date: 12/21/2023		Location: MAIN		Customer Group: {All}			
Option	Option Value	MTD			YTD		
		2022	2023	Comparison	2022	2023	Comparison
JAMBEX- JAMB EXTENSIONS	4 9/16	\$0.00	\$0.00	0.00%	\$0.00	\$186.49	100.00%
CSS- CUSTOM SASH SIZE	12	\$0.00	\$0.00	0.00%	\$93.60	\$0.00	-100.00%
JAMBEX- JAMB EXTENSIONS	4 9/16	\$0.00	\$0.00	0.00%	\$662.40	\$0.00	-100.00%
Totals		\$0.00	\$0.00	0.00%	\$756.00	\$186.49	-75.33%

The following information is available on the 'Sales by Option Value MTD / YTD' report:

- **Option** – Option selected for the item.
- **Option Value** – Option value selected.
- **MTD** – Amount of sales containing this option value for the selected month to date.
 - **Selected year** – The amount of sales (income) from the first of the month to the selected date for the selected year.

- **Previous year** – The amount of sales (income) from the first of the month to the selected date for the previous year.
- **Comparison** – Percentage change in sales between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.
- **YTD** – Amount of sales containing this option value for the selected year to date.
 - **Selected year** – The amount of sales (income) from January 1st to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from January 1st to the selected date for the previous year.
 - **Comparison** – Percentage change in the sales between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

By Salesperson MTD / YTD

The 'Sales by Person MTD / YTD' report displays month-to-date and year-to-date of sales figures grouped by salesperson. The information on this report reflects invoices that have been posted within the given date range. By default, the report generates for the current month and year based on the date the report is run.

To access this report, select 'Management' >> 'Sales MTD / YTD' >> 'By Salesperson MTD / YTD'.

Date:	12/22/2023	Customer Group:	{All}			
Currency:	Canadian Dollar					
<div style="display: flex; justify-content: space-between; align-items: center;"> 1 of 1 100% </div>						
Sales by Person MTD/YTD						
Date:	12/22/2023	Location:	MAIN			
		Customer Group:	{All}			
Person	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
Jamison, Janice	\$0.00	\$4,545.65	100.00%	\$3,258.05	\$20,227.26	520.84%
curry, tom	\$0.00	\$385.65	100.00%	\$0.00	\$3,746.05	100.00%
DeFrench, Kaitlyn	\$0.00	\$0.00	0.00%	\$3,635.52	\$0.00	-100.00%
Totals	\$0.00	\$4,931.30	100.00%	\$6,893.57	\$23,973.31	247.76%

The following information is available on the 'Sales by Person MTD / YTD' report:

- **Person** – Name of the salesperson.
- **MTD** – Amount of sales from the salesperson for the selected month to date.
 - **Selected year** – The amount of sales (income) from the first of the month to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from the first of the month to the selected date for the previous year.
 - **Comparison** – Percentage change in sales between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.
- **YTD** – Amount of sales from the salesperson for the selected year to date.
 - **Selected year** – The amount of sales (income) from January 1st to the selected date for the selected year.
 - **Previous year** – The amount of sales (income) from January 1st to the selected date for the previous year.
 - **Comparison** – Percentage change in the sales between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the sales for this customer have increased 50% from the previous year over the same month.

Orders Open

The 'Orders Open' report will display orders not yet completed or closed over a given date range. This helps to ensure overdue orders are monitored and can be managed. The report will group by date to show totals for each day. By default, the report generates for the last day with Display By set to Required Date and Display set to {All}.

To access the 'Orders Open' report, select 'Management' >> 'Orders Open'.

Start Date:	12/21/2023	End Date:	1/24/2024
Display By:	Required Date	Display:	{All}
Currency:	Canadian Dollar		

Orders Open Start Date: 12/21/2023 End Date: 1/24/2024 Location: MAIN Filter By: Required Date Display: {All}							
Date	Order	Type	Target Ship Date	Req Date	Customer	Salesperson	Subtotal
12/14/2023	11562	Order	12/21/2023	12/21/2023	Atlantic Installers[28]	None	\$0.00
12/14/2023	11564	Order	12/21/2023	12/21/2023	Atlantic Installers[28]	None	\$7,871.28
12/14/2023	11565	Order	12/21/2023	12/21/2023	Atlantic Installers[28]	None	\$9,020.27
12/14/2023	11566	Order	12/21/2023	12/21/2023	Atlantic Installers[28]	None	\$427.72
12/14/2023	11570	Order	12/21/2023	12/21/2023	Bird Construction[20]	Jamison, Janice	\$453.80
12/14/2023	11571	Order	12/21/2023	12/21/2023	Bird Construction[20]	Jamison, Janice	\$1,361.39
							\$19,134.46
12/14/2023	11563	Order	1/9/2024	1/9/2024	ABC Windows[8]	None	\$674.50
							\$674.50
							\$19,808.96

The following information is outlined in the 'Orders Open' report:

- **Date** – Order date
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Type** – Type of order, either 'Order', 'Quote', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'.
- **Target Ship Date** – Stands for 'Target Ship Date'. Date the order is expected to ship.
- **Required Date** – Date the customer requires the order.
- **Customer** – Customer name.
- **Salesperson** – Person responsible for the sale.
- **Subtotal** – Subtotal of the salesperson's order.
- **Total** – Total sales for the date range and filters indicated.

Note: Results will be grouped by the filtered date selected, with individual totals for each day and an overall total value at the bottom of the screen. The total value does not include sales tax.

Work in Process

The 'Work in Process' reports outline the value of all items released to production, not scanned completed, or invoiced by customer. All items are grouped by schedule and a sub-total is calculated for each schedule. By default both reports show quantities of units released to production. Both reports can be set to only show quantities that have begun production (scanned units with a status other than Complete) by setting the InventorySettings GSP WIPReportRequireProductionStatus to 1.

Summary

The 'Work in Process' (Summary) report outlines parts currently in production by customer. This report helps identify orders, entered since a given date, that are currently being processed for customers. By default, the report generates for the last 30 days.

To access the 'Work in Process' (Summary) report, select 'Management' >> 'Work in Process' >> 'Summary'.

Start Date:

Currency:

1 of 1 100%

Work in Process

Start Date: 11/23/2023 Location: MAIN

Customer	Order	Date	Qty	Direct Cost	Indirect Cost	Total Cost
5481 - SJ 1124-3						
Austrian Aviation[44]	11518--SS	11/24/2023	5	\$0.00	\$0.00	\$0.00
			Subtotal	5	\$0.00	\$0.00
5493 - JS DH 12/7/23						
FeneTech[18]	11543	12/7/2023	10	\$749.93	\$0.00	\$749.93
			Subtotal	10	\$749.93	\$749.93
5499 - SJ 1214-1						
Atlantic Installers[28]	11564	12/14/2023	1	\$169.42	\$0.00	\$169.42
	11565	12/14/2023	5	\$335.21	\$0.00	\$335.21
			Subtotal	6	\$504.63	\$504.63
			Total	21	\$1,254.55	\$1,254.55


The following information is available in the 'Work in Process' (Summary) report:


- **Customer** – Customer name filtered by schedule.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Date** – Order date.
- **Qty** – Number of items in the order.
- **Direct Cost** – Reflects the material cost of the part.
- **Indirect Cost** – Reflects other costs such as labor.
- **Total Cost** – Direct + Indirect cost.



Detailed

The 'Work in Process Detailed' report outlines a further detailed assessment at the order-item level grouped by customer of units that are currently in production. By default, the report generates for the last 30 days.

To access the 'Work in Process Detailed' report, select 'Management' >> 'Work in Process' >> 'Detailed'.

Start Date: 

Currency: 

1 of 1  100% 

Work in Process Detailed

Start Date: 12/4/2023 Location: MAIN

Customer	Order-Item	Date	Qty	Part	Direct Cost	Indirect Cost	Total Cost
5493 - JS DH 12/7/23							
FeneTech[18]	11543-1	12/7/2023	10	8660DH - DOUBLE HUNG	\$749.93	\$0.00	\$749.93
Subtotal			10		\$749.93	\$0.00	\$749.93
5499 - SJ 1214-1							
Atlantic Installers[28]	11564-1	12/14/2023	1	8100SH.TWIN - SINGLE HUNG TWIN	\$169.42	\$0.00	\$169.42
	11565-1	12/14/2023	5	8015BOW - 5-LITE BOW	\$335.21	\$0.00	\$335.21
Subtotal			6		\$504.63	\$0.00	\$504.63
Total			16		\$1,254.55	\$0.00	\$1,254.55

The following information is available on the 'Work in Process Detailed' report:

- **Customer** – Customer name filtered by schedule.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Date** – Order date.
- **Qty** – Number of items in the order.
- **Direct Cost** – Reflects the material cost of the part.
- **Indirect Cost** – Reflects other costs such as labor.
- **Total Cost** – Direct + Indirect cost.

Finished Goods

The 'Finished Goods' report displays the value of orders with items released to production, scanned completed, but not yet invoiced.

Summary

The 'Finished Goods' (Summary) report outlines a summary of orders finished by customer. This report helps identify how many orders, entered since a given date, have been completed for a customer. By default, the report generates for the last 30 days.

To access the 'Finished Goods' report, select 'Management' >> 'Finished Goods' >> 'Summary'.

Start Date:

Currency:

Navigation: 1 of 1 100%

Finished Goods

Start Date: 12/1/2023 Location: MAIN

Customer	Order	Date	Qty	Direct Cost	Indirect Cost	Total Cost
Atlantic Installers[28]	11564	12/14/2023	4	\$677.66	\$0.00	\$677.66
			Subtotal	4	\$677.66	\$0.00
Atom Annealing	11574	12/14/2023	6	\$193.42	\$0.00	\$193.42
	11575	12/14/2023	3	\$82.41	\$0.00	\$82.41
			Subtotal	9	\$275.83	\$0.00
Bird Construction[20]	11571	12/14/2023	6	\$193.42	\$0.00	\$193.42
			Subtotal	6	\$193.42	\$0.00
Dynamet Windows[11]	11572	12/14/2023	6	\$193.42	\$0.00	\$193.42
	11573	12/14/2023	6	\$193.42	\$0.00	\$193.42
			Subtotal	12	\$386.83	\$0.00
			Total	31	\$1,533.74	\$0.00


The following information is available on the 'Finished Goods' (Summary) report:


- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Date** – Order date.
- **Quantity** – Number of items in the order.
- **Direct Cost** – Reflects the material cost of the part.
- **Indirect Cost** – Reflects other costs such as labor.
- **Total Cost** – Direct + Indirect cost.
- **Subtotal** – Sum of the previous five columns for each customer.
- **Total** – Sum of the previous five columns for all customers displayed.






Detailed

The 'Finished Goods Detailed' report details information regarding each finished good by customer. By default, the report generates for the last 30 days.

To access the 'Finished Goods' report, select 'Management' >> 'Finished Goods' >> 'Detailed'.

Start Date: 12/1/2023 

Currency: Canadian Dollar 

1 of 1    100%  

Finished Goods Detailed

Start Date: 12/1/2023 Location: MAIN

Customer	Order	Date	Item	Qty	Part	Container	Date/Time	Direct Cost	Indirect Cost	Total Cost
Atlantic Installers[28]	11564	12/14/2023	1	4	8100SH.TWIN - SINGLE HUNG TWIN		12/14/2023 10:43:00 AM	\$677.66	\$0.00	\$677.66
			Subtotal	4				\$677.66	\$0.00	\$677.66
Atom Annealing	11574	12/14/2023	1	3	8000PW - PICTURE WINDOW		12/14/2023 1:22:00 PM	\$82.41	\$0.00	\$82.41
Atom Annealing	11574	12/14/2023	2	3	8100SH - SINGLE HUNG		12/14/2023 1:22:00 PM	\$111.00	\$0.00	\$111.00
Atom Annealing	11575	12/14/2023	1	3	8000PW - PICTURE WINDOW		12/14/2023 1:42:00 PM	\$82.41	\$0.00	\$82.41
			Subtotal	9				\$275.83	\$0.00	\$275.83
Bird Construction[20]	11571	12/14/2023	1	3	8000PW - PICTURE WINDOW		12/14/2023 11:13:00 AM	\$82.41	\$0.00	\$82.41
Bird Construction[20]	11571	12/14/2023	2	3	8100SH - SINGLE HUNG		12/14/2023 11:13:00 AM	\$111.00	\$0.00	\$111.00
			Subtotal	6				\$193.42	\$0.00	\$193.42
Dynamet Windows[11]	11572	12/14/2023	1	3	8000PW - PICTURE WINDOW		12/14/2023 11:13:00 AM	\$82.41	\$0.00	\$82.41
Dynamet Windows[11]	11572	12/14/2023	2	3	8100SH - SINGLE HUNG		12/14/2023 11:13:00 AM	\$111.00	\$0.00	\$111.00
Dynamet Windows[11]	11573	12/14/2023	1	3	8000PW - PICTURE WINDOW		12/14/2023 11:13:00 AM	\$82.41	\$0.00	\$82.41
Dynamet Windows[11]	11573	12/14/2023	2	3	8100SH - SINGLE HUNG		12/14/2023 11:13:00 AM	\$111.00	\$0.00	\$111.00
			Subtotal	12				\$386.83	\$0.00	\$386.83
			Total	31				\$1,533.74	\$0.00	\$1,533.74

The following information is available on the 'Finished Goods Detailed' report:

- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Date** – Order date.
- **Item** – Line item number of the order.
- **Qty** – Number of units on the line item.
- **Part** – Detailed identifier of the part.
- **Container** – Identity of the container accommodating those units.
- **Date / Time** – Date and time the order was last scanned/processed.
- **Direct Cost** – Reflects the material cost of the part.
- **Indirect Cost** – Reflects other costs such as labor.
- **Total Cost** – Direct + Indirect cost.

Purchasing

Purchase Order Reject History

The 'Purchase Order Reject History' report shows PO's that have been rejected for any reason over a specified period. If a reject comment exists, it can be found directly under the PO. By default, the report generates for the last 7 days for the main location with all vendors, reject groups, and reject codes selected.

To access this report, select 'Management' >> 'Purchasing' >> 'PO Reject History'.

Note: Only rejected purchase orders that have a reject code are shown in this report.

Start Date: 3/1/2018 End Date: 1/24/2024

Location: AURORA Vendor: {All}

Reject Group: PURCHASING Reject Code: {All}

1 of 1 100% Find | Next

Purchase Order Reject History

Start Date: 2/27/2020 End Date: 3/5/2020 Reject Group: PURCHASING
 Location: MAIN Vendor: {All} Reject: {All}

PO	Type	Date	Vendor	Entered By	Reject	Subtotal
RPO00066	Return	3/5/2020	KD Vendor	DeFrench, Kaitlyn	PRODUCT DAMAGED	\$25.00
Comment: Glass broken in transit						
Purchase Orders:						1
Total:						\$25.00

The following information is available on the 'Purchase Order Reject History' report:

- **PO** – Original PO of the rejected part.
- **Type** – PO type.
- **Date** – Date the part was rejected.
- **Vendor** – Vendor name.
- **Entered By** – Personnel responsible for entering the quote.
- **Reject** – Reason for rejection.
- **Subtotal** – Value of rejected portion.
- **Comments** – Any comments made regarding the rejected part.
- **Purchase Orders** – Total number of PO's rejected.
- **Total** – Total value from rejected units.

Vendor Scorecard

The 'Vendor Scorecard' report shows an overview of purchasing statistics regarding vendors ability to deliver on time, the quality of the purchased items and the accuracy of the actual cost from the original purchase order.

To access the 'Vendor Scorecard' report, select 'Management' >> 'Vendor Scorecard'.

1 of 1 100% Find | Next

Vendor Scorecard

Vendor	On Time Delivery		Quality %		Price %	
	30 Days	90 Days	30 Days	90 Days	30 Days	90 Days
Aurora Location	N/A	100.00%	N/A	96.15%	N/A	100.00%
Design Zone CAN	100.00%	100.00%	100.00%	100.00%	57.14%	57.14%
Design Zone EUR	75.00%	75.00%	94.44%	94.44%	16.67%	16.67%
Design Zone Vendor	92.68%	92.68%	100.00%	73.68%	88.00%	88.00%
KD Vendor	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

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The following information is available on the 'Vendor Scorecard' report:

- **On Time Delivery** – This section shows the percentage of purchased items that were received prior to or on the Required Date on the purchase order. Receipts posted within the last 30 or 90 days from the current date will affect the respective column.

- **Quality %** - This section shows the percentage of items on posted return purchase orders versus items received. Return purchase orders posted within the last 30 or 90 days from the current date will affect the respective column.
- **Price %** - This section shows the percentage of line item prices that match between the purchase order invoice and the original purchase order. Purchase order invoices posted within the last 30 or 90 days from the current date will affect the respective column.

Orders Open by Category

The 'Orders Open by Category' report outlines the categories that contain orders that have not yet been closed or completed. The information is displayed based on the given date range and the 'Display By' setting. By default, the report generates for the last day, displaying by required date.

To access the 'Orders Open by Category' report, select 'Management' >>'Orders Open by Category'.

Orders Open by Category

Start Date: 12/1/2023 End Date: 1/24/2024 Location: MAIN
 Filter By: Required Date Display: {All}

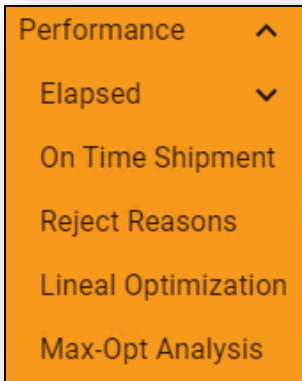
Category	Qty	SqFt	Subtotal
8000 Series Windows	107	959.70	\$31,060.81
Bay/Bow	5	75.00	\$9,020.27
Misc	25	0.00	\$16,242.51
Misc Building Materials	21	0.00	\$213.29
QA - Design Zone Products	3	20.83	\$0.00
Stacks & Mulls	5	150.78	\$7,871.28
	166	1,206.32	\$64,408.16

The following information is available on the 'Orders Open by Category' report:

- **Category** – Description of categories belonging to open orders. Links to the 'Orders Open' report.
- **Quantity** – The number of units belonging to each category on open orders.
- **SqFt (SqM)** – The total number of square feet or square meters on open orders.
- **Subtotal** – Dollar amount of each category belonging to an open order.

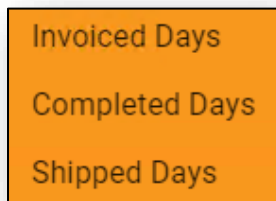
Performance

This section will explain the menu items associated with the 'Performance' menu.



Elapsed

The 'Elapsed' menu shows the elapsed days between order creation and various order completion actions such as invoicing, completing and shipping.



Invoiced Days

'Invoiced Elapsed Days' details number of days between the order date and the invoice date (the invoice date minus the order date). This report is helpful in evaluating the time it takes to manage customer orders from order entry to invoicing. The report displays information on orders entered within the given date range. By default, the report generates for the last 30 days

To access the 'Invoiced Elapsed Days' report, select 'Performance' >> 'Elapsed' >> 'Invoiced Days'.

Start Date:	<input type="text" value="12/1/2023"/>	End Date:	<input type="text" value="1/24/2024"/>
Customer:	{All}	Site:	{All}

1 of 1		100%
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Invoiced Elapsed Days

Start Date: 12/1/2023 End Date: 1/24/2024 Location: MAIN
 Customer: {All} Site: {All}

Order	Parts	Date	Invoice Date	Closed Incomplete	Elapsed Days
11550	8660DH, SUR-SCUM	12/12/2023	12/12/2023	No	0
11552	33184SURCHARGE, 8000PW	12/12/2023	12/12/2023	No	0
11553	33184SURCHARGE, 8000PW	12/12/2023	12/12/2023	No	0
11554	8660DH, SUR-SCUM	12/12/2023	12/12/2023	No	0
11555	8660DH, SUR-SCUM	12/12/2023	12/12/2023	No	0
11551	8660DH, SUR-SCUM	12/12/2023	12/12/2023	No	0
Total Orders					6
Average Days					0.00

The following information is available on the 'Invoiced Elapsed Days' report:

- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.

- **Parts** – Description of the parts affiliated with the order.
- **Date** – Order date.
- **Invoice Date** – Date assigned to the invoice.
- **Closed Incomplete** – Indicates if an order was closed manually, without being completed.
- **Elapsed Days** – The number of days between the order date and the invoice date.
- **Total Orders** – Total number of orders (not ‘Elapsed Days’).
- **Average Days** – Average of the total elapsed days, i.e., total elapsed days / total number of orders.

Completed Days

The ‘Completed Elapsed Days’ report calculates the number of days between the time a customer places an order and the time the order is complete (the complete date minus the order date). This report is especially helpful when evaluating lead times for products and customers. The report displays information on orders entered within the given date range. By default, the report generates for the last 30 days

To access the ‘Completed Elapsed Days’ report, select ‘Performance’ >> ‘Elapsed’ >> ‘Completed Days’.

Note: Users who do not have the FeneVision Tracking application will find that this report will function differently. Since the item cannot receive a completed scan from Tracking, the report then uses the ship date instead.

Start Date:	<input type="text" value="12/14/2023"/>	End Date:	<input type="text" value="1/24/2024"/>
Customer:	{All}	Site:	{All}

1	of 1	100%
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Completed Elapsed Days

Start Date: 12/14/2023 End Date: 1/24/2024 Location: MAIN
 Customer: {All} Site: {All}

Order	Parts	Date	Ack Date	Release Date	Complete Date	Elapsed Days
11561	BWSUR, SILICONE	12/14/2023	12/14/2023		12/14/2023	0
11562	33184SURCHARGE, 8000PW	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11571	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11572	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11573	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11574	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11575	33184SURCHARGE, 8000PW, BWSUR, SILICONE	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
Total Orders						7
Average Days						0.00

The following information is available on this ‘Completed Elapsed Days’ report:

- **Order** – Alphanumeric identifier of the order. Links to the ‘Order Status’ report.
- **Parts** – All parts associated with the order.
- **Date** – Order date.
- **Ack Date** – Date the order was acknowledged.
- **Release Date** – Date the order was released to production.
- **Complete Date** – Date the order was determined to be completed.

- **Elapsed Days** – The number of days between the order date and the invoice date.
- **Total Orders** – Sum of the quantity of orders (not ‘Elapsed Days’).
- **Average Days** – Average of the total elapsed days, i.e., total elapsed days / total number of orders.

Shipped Days

The ‘Shipped Elapsed Days’ report calculates the number of days between the time an order is acknowledged and the time the order is shipped (the ship date minus the acknowledgement date). This report is helpful in evaluating the time it takes to manage customer orders from order entry to shipment. The report displays information on orders entered within the given date range. By default, the report generates for the last 30 days

To access the ‘Shipped Elapsed Days’ report, select ‘Performance’ >> ‘Elapsed’ >> ‘Shipped Days’.

Order	Parts	Date	Ack Date	Release Date	Complete Date	Ship Date	Elapsed Days
11562	33184SURCHARGE, 8000PW	12/14/2023	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11571	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11572	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11573	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11574	33184SURCHARGE, 8000PW, 8100SH, BWSUR, PTSTUP, SILICONE, SURCHARGE, SURCHARGE BY OUNCE, SURCHARGE BY POUND	12/14/2023	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
11575	33184SURCHARGE, 8000PW, BWSUR, SILICONE	12/14/2023	12/14/2023	12/14/2023	12/14/2023	12/14/2023	0
Total Orders							6
Average Days							0.00

The following information is available on the ‘Shipped Elapsed Days’ report:

- **Order** – Alphanumeric identifier of the order. Links to the ‘Order Status’ report.
- **Parts** – All parts associated with the order.
- **Date** – Order date.
- **Ack. Date** – Date the order was acknowledged.
- **Release Date** – Date the order was released to production.
- **Complete Date** – Date the order was determined to be completed.
- **Ship Date** – Date the order was shipped.
- **Elapsed Days** – The number of days between the order date and the ship date.
- **Total Orders** – Total number of orders in the report (not ‘Elapsed Days’).
- **Average Days** – Average number of the total elapsed days, i.e., total elapsed days / total number of orders.

On Time Shipment

The ‘On Time Shipment’ report tracks the percentage of acknowledged orders that are shipped prior to or on the original required date established during order entry, and displays orders that did not ship on time. The report will display a message letting the user know the percentage of orders that were delivered on or before the original required date. By default, the report generates for the last 30 days for all customers and sites, with the start and end dates being based on the orders’ required dates. All orders not shipped on-time within the selected date range will show in the grid of the report, whether the order is still open, or the order is shipped and/or closed.

Note: If an order is partially shipped on-time, the order will remain on the On Time Shipment report as not on time, as the full order was not shipped on time.

To access the 'On Time Shipment' report, select 'Performance' >> 'On Time Shipment'.

Start Date: 12/14/2023 End Date: 1/24/2024 Filter: Original Required Date

Customer: {All} Site: {All} Status: {All}

1 of 1 100% [Icons]

On Time Shipment

Start Date: 12/14/2023 End Date: 1/24/2024 Filter: Original Required Date
 Customer: {All} Site: {All} Status: {All}
 Location: MAIN

14 of 25 (56%) orders were shipped on or before their Original Required Date. The orders that were not are listed below.

Customer	Order	Date	Ack Date	Original Req Date	Req Date	Ship Date
Austrian Aviation	11561	12/14/2023	12/14/2023	12/15/2023	12/15/2023	
Atom Annealing	11557	12/13/2023	12/13/2023	12/18/2023	12/18/2023	
Austrian Aviation	11558	12/13/2023	12/13/2023	12/18/2023	12/18/2023	
Atom Annealing	11567	12/14/2023	12/14/2023	12/20/2023	12/20/2023	
Dynamet Windows	11568	12/14/2023	12/14/2023	12/20/2023	12/20/2023	
	11569	12/14/2023	12/14/2023	12/20/2023	12/20/2023	
Atlantic Installers	11564	12/14/2023	12/14/2023	12/21/2023	12/21/2023	
	11565	12/14/2023	12/14/2023	12/21/2023	12/21/2023	
	11566	12/14/2023	12/14/2023	12/21/2023	12/21/2023	
Bird Construction	11570	12/14/2023	12/14/2023	12/21/2023	12/21/2023	
ABC Windows	11563	12/14/2023	12/14/2023	1/9/2024	1/9/2024	

Note: The statement above the grid indicates the percentage of orders delivered on or before the 'Original Required Date'. This means that multiple required date orders could be inaccurate as the child order history is deleted when the required date is changed.

The following information is available on the 'On Time Shipment' report:

- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Original Req Date** – First date the order is required by the customer.
- **Req Date** – Current date the order is required by the customer.
- **Date** – Order date.
- **Ack Date** – Date the order was acknowledged.
- **Ship Date** – Date the order was shipped or partially shipped.

Reject Reasons

The 'Reject Reasons' report will show the number of items rejected by reject group and reason. This report is helpful when evaluating if a reject code is consistently being used in order to put in corrective and/or preventative actions. By default, the report generates for the last 30 days for all customers and sites.

To access the 'Reject Reasons' report, select 'Performance' >> 'Reject Reasons'.

Start Date:	4/3/2023	End Date:	1/24/2024		
Group:	{All}	Station:	{All}		
<p>1 of 1</p> <p>100%</p>					
Reject Reasons					
Start Date:	4/3/2023	End Date:	1/24/2024		
Group:	{All}	Station:	{All}		
Location:	MAIN				
Group	Code	Description	Lot Number	Qty	Reject %
	BROKE	GLASSCRACK		3	100.00%
Totals				3	
FRAME	FBAD	BAD FRAME		2	100.00%
Totals				2	
GLASS REJECT IG	GBIW	GLASS BROKE IN WAREHOUSE		2	100.00%
Totals				2	
IG	IGSEAL	BAD IG SEAL		1	100.00%
Totals				1	

The 'Reject Reasons by Date' report details the following information:

- **Group** – Specific reject group to which the reject code belongs.
- **Code** – Reject code.
- **Description** – Detailed accounting of the reject reason.
- **Qty** – Number of items rejected for the reject reason.
- **Reject %** – Percentage of part items rejected for the reject reason.

Lineal Optimization

The 'Lineal Optimization' report summarizes the optimized inventory for a given range of production dates and schedules. This report helps to understand the quantity required versus the quantity actually used for various parts. If using Opti-Glass, this report will also show the yield percentage associated with each scheduler/batch. By default, the report generates for the last 30 days with Show Batch set to true.

To access the 'Lineal Optimization' report, select 'Performance' >> 'Lineal Optimization'.

Start Date: 9/30/2021 End Date: 1/24/2022

Show Batch: True False

1 of 2 100%

Lineal Optimization

Start Date: 9/30/2021 End Date: 1/24/2022 Show Batch: True Location: MAIN
14 schedules found between 9/30/2021 and 1/24/2022

Schedule: 5086

Batch ID	Part	Qty Required	Qty Used	Yield %
2	VF9564WH-MEETING RAIL WHITE	65.50 IN	1 STICK	34.11%

Schedule: 5087

Batch ID	Part	Qty Required	Qty Used	Yield %
2	VF9564WH-MEETING RAIL WHITE	294.75 IN	3 STICK	51.17%

Schedule: 5118

Batch ID	Part	Qty Required	Qty Used	Yield %
1	VF9861WH-PW FRAME / SH HEAD WHITE	328.00 IN	2 STICK	85.42%

The following information is available on the 'Lineal Optimization' report:

- **Schedule** – Identifying number of the schedule.
- **Batch ID** – Identification number of the batch in the schedule.
- **Part** – Alphanumeric identifier of the specific part.
- **Qty Required** – Number of parts required for the schedule to be optimized.
- **Qty Used** – Actual number of parts used.
- **Yield %** - Percentage of sheets that were used for production (Yield % = 100 x Product SqFt (SqM) / Total SqFt (SqM)).

MAX-Opt Analysis (window manufacturers only)

For window manufacturers, 'MAX-Opt Analysis' provides a reporting tool that recognizes the savings incurred by using MAX-Opt. By default, the report generates for the last 7 days, selecting any machine that has MaxOpt options and all parts.

To access the 'MAX-Opt Analysis' report, select 'Performance' >> 'MAX-Opt Analysis'.

Max-Opt Analysis

Start Date: 7/7/2015 End Date: 9/25/2015 Location: {All}
Machine: ALL MACHINES

Schedule - Description	Standard Optimization				Max-Opt Results				Max-Opt Savings				
	Loads	Cycles	Sticks	% Yield	Loads	Cycles	Sticks	% Yield	Loads	Cycles	Sticks	% Savings	Savings
2428 - 8/20/2015 Production	2	4	2	33.33	2	4	2	33.33	0	0	0	0.00	\$0.00
2427 - 8/7/2015 Production	56	252	56	77.23	56	252	52	83.17	0	0	-4	7.14	\$7.36
2426 - 7/23/2015 Production	48	212	48	74.59	50	212	44	81.37	2	0	-4	8.33	\$7.04
426 - 7/10/2015 Production	22	96	22	74.24	22	96	22	74.24	0	0	0	0.00	\$0.00
425 - 7/9/2015 Alerts	36	87	40	43.40	36	87	40	43.40	0	0	0	0.00	\$0.00
Totals:	2	0	-8				4.76				\$14.40		

These values were obtained using conservative Max-Opt settings. Additional savings are probable. Please contact Fenetech for more information.

The following information is available on the 'Max-Opt Analysis' report:

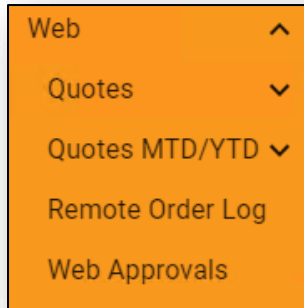
- **Schedule Description** – Schedule number and description.
- **Standard Optimization** – Expected optimization results.
 - **Loads** – Expected number of loads used during optimization.
 - **Cycles** – Expected number of cycles used during optimization.
 - **Sticks** – Expected number of sticks used during optimization.
 - **% Yield** – Expected yield of consumed parts versus waste.
- **Max-Opt Results** – Actual optimization results.

- **Loads** – Actual number of loads used during optimization.
- **Cycles** – Actual number of cycles used during optimization.
- **Sticks** – Actual number of sticks used during optimization.
- **% Yield** – Actual yield of consumed parts versus waste.

- **Max-Opt Savings** – Savings from using Max-Opt.
 - **Loads** – Number of loads saved during optimization.
 - **Cycles** – Number of cycles saved during optimization.
 - **Sticks** – Number of sticks saved during optimization.
 - **% Yield** – Savings in yield of consumed parts versus waste.

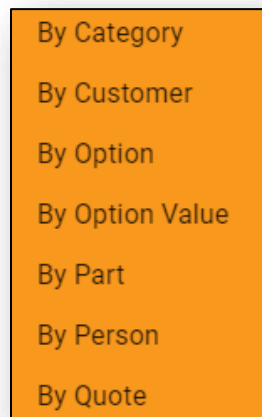
Web

FeneVision Web users can access reports associated with quotes and orders entered in Web.



Quotes

The 'Quotes' reports outline details associated with quotes entered in FeneVision Web.



Web Quotes by Category

The 'Web Quotes by Category' report outlines information regarding quotes entered within the given date range in Web and organized by production category. By default, the report generates for the last 30 days.

To access the 'Web Quotes by Category' report, select 'Web' >> 'Quotes' >> 'By Category' from the drop-down menu.

Start Date: 1/1/2023 End Date: 1/24/2024 Currency: Canadian Dollar

1 of 1 100%

Web Quotes by Category

Start Date: 1/1/2023 End Date: 1/24/2024 Location: MAIN

Category	Qty	Total Quoted	Converted Value	Converted %	Quote %
P	27	\$411.19	\$224.19	54.52%	0.41
P 8000 Series Windows	17	\$6,891.06	\$4,746.14	68.87%	6.79
P Bay/Bow	7	\$22,192.62	\$9,075.95	40.90%	21.87
P Misc	8	\$7,025.57	\$7,018.54	99.90%	6.92
P QA - Design Zone Products	1	\$168.92	\$0.00	0.00%	0.17
P Stacks & Mulls	9	\$64,789.61	\$4,961.76	7.66%	63.85
Totals	69	\$101,478.97	\$26,026.58		

The following information is available on the 'Web Quotes by Category' report:

- **P** – Links to the 'Web Quotes by Part' report for that particular category.
- **Category** – Category of parts quoted.
- **Qty** – Quantity of parts quoted.
- **Total Quoted** – Entire dollar amount of quotes that contain parts in the specific category.
- **Converted Value** – Valuation of Web quotes that were converted to orders.
- **Converted %** – Percentage of total quote valuation that was converted to orders. Converted value divided by 'Total Quoted'.
- **Quote %** – Percentage of the all quote valuation that contain parts in the particular category. The category 'Total Quoted' divided by 'Total Quoted' for all categories.

Web Quotes by Customer

The 'Web Quotes by Customer' report outlines information regarding quotes entered within the given date range in Web and organized by customer. By default, the report generates for the last 30 days with No select for the group sites filter.

To access the 'Web Quotes by Customer' report, select 'Web' >> 'Quotes' >> 'By Customer' from the drop-down menu.

Start Date: 2/1/2023 End Date: 1/24/2024 Currency: Canadian Dollar

Group Sites: No 1 of 1 100%

Web Quotes by Customer

Start Date: 2/1/2023 End Date: 1/24/2024 Location: MAIN

Customer	Qty	Total Quoted	Converted Value	Converted %	Quote %
P O Q ABC Windows[10]	12	\$16,547.14	\$12,108.72	73.18%	16.31%
P O Q ABC Windows[8]	19	\$10,131.51	\$9,387.20	92.65%	9.98%
P O Q ABC Windows[9]	2	\$2,077.42	\$1,038.71	50.00%	2.05%
P O Q Atom Annealing	20	\$63,898.00	\$1,296.59	2.03%	62.97%
P O Q Design Zone[33]	16	\$8,824.90	\$2,195.36	24.88%	8.70%
Totals	69	\$101,478.97	\$26,026.58		

The following information is available on the 'Web Quotes by Customer' report:

- **P** – Links to the 'Web Quotes by Part' report for that particular customer.

- **O** – Links to the ‘Web Quotes by Option’ report for that particular customer.
- **Q** – Links to the ‘Web Quotes by Quotes’ report for that particular customer.
- **Customer** – Customer’s name.
- **Qty** – Quantity of units for that customer’s quotes.
- **Total Quoted** – Entire dollar amount of customer’s quote in FeneVision Web.
- **Converted Value** – Valuation of Web quotes that were converted to orders.
- **Converted %** – Percentage of total quote valuation that was converted to orders. Converted value divided by ‘Total Quoted’.
- **Quote %** – Percentage of the all quote valuation for a particular customer. The specific customer ‘Total Quoted’ divided by ‘Total Quoted’ for all customers.

Web Quotes by Option

The ‘Web Quotes by Option’ report outlines information regarding quotes entered within the given date range in Web and organized by part options. By default, the report generates for the last 30 days with all other filters filtered to {All}.

To access the ‘Web Quotes by Option’ report, select ‘Web’ >> ‘Quotes’ >> ‘By Option’ from the drop-down menu.

Option	Qty	Total Quoted	Converted Value	Converted %	Quote %
P ARG-ARGON GAS	5	\$33.78	\$33.78	100.00%	7.01%
P CH-CHERRY	5	\$38.58	\$38.58	100.00%	8.01%
P CHOC-CHOCOLATE	5	\$101.35	\$101.35	100.00%	21.04%
P CLCL-CLEAR/CLEAR IG	5	\$0.00	\$0.00	0.00%	0.00%
P EPSTK-STOCK EXTERIOR PAINT	5	\$3.85	\$3.85	100.00%	0.80%
P EX-EXACT SIZE	5	\$0.00	\$0.00	0.00%	0.00%
P FIBR-FIBERGLASS	5	\$0.00	\$0.00	0.00%	0.00%
P HEADEX-HEAD EXPANDER	5	\$33.78	\$33.78	100.00%	7.01%
P HS-HALF SCREEN	5	\$0.00	\$0.00	0.00%	0.00%
P NF-NAIL FIN	5	\$270.27	\$270.27	100.00%	56.12%
P OV SHG-Solar Heat Gain Coefficient	5	\$0.00	\$0.00	0.00%	0.00%
P OV UF-U-Factor	5	\$0.00	\$0.00	0.00%	0.00%
P OV VT-Visible Transmittance	5	\$0.00	\$0.00	0.00%	0.00%
Totals	65	\$481.62	\$481.62		

The following information is available on the ‘Web Quotes by Option’ report:

- **P** – Links to the ‘Web Quotes by Part’ report for that particular option.
- **Option** – Option for the part quoted in FeneVision Web.
- **Qty** – Number of units quoted that contain the specific option.
- **Total Quoted** – Entire dollar amount of quotes that contain the specific option code.
- **Converted Value** – Valuation of Web quotes that were converted to orders.
- **Converted %** – Percentage of total quote valuation that was converted to orders. Converted value divided by ‘Total Quoted’.
- **Quote %** – Percentage of the all quote valuation that contain the specific option. The option ‘Total Quoted’ divided by ‘Total Quoted’ for all options.

Web Quotes by Option Value

The 'Web Quotes by Option Value' report outlines information regarding quotes entered within the given date range in Web and organized by part option values. By default, the report generates for the last 30 days with all other filters filtered to {All}.

To access the 'Web Quotes by Option Value' report, select 'Web' >> 'Quotes' >> 'By Option Value' from the drop-down menu.

Option	Option Value	Qty	Total Quoted	Converted Value	Converted %	Quote %
SHG - Solar Heat Gain Coefficient	0.34	5	\$0.00	\$0.00	0.00%	0.00%
UF - U-Factor	0.22	5	\$0.00	\$0.00	0.00%	0.00%
VT - Visible Transmittance	0.47	5	\$0.00	\$0.00	0.00%	0.00%
Totals		15	\$0.00	\$0.00		

The following information is available on the 'Web Quotes by Option Value' report:

- **Option** – Option for the part quoted in Web.
- **Option Value** – Option value for the part's option quoted in Web.
- **Qty** – Number of units quoted that contain the specific option value.
- **Total Quoted** – Entire dollar amount of quotes that contain the specific option value.
- **Converted Value** – Valuation of Web quotes that were converted to orders.
- **Converted %** – Percentage of total quote valuation that was converted to orders. Converted value divided by 'Total Quoted'.
- **Quote %** – Percentage of the all quote valuation that contain the specific option value. The option value 'Total Quoted' divided by 'Total Quoted' for all option values.

Web Quotes by Part

The 'Web Quotes by Part' report outlines information regarding quotes entered within the given date range in Web and organized by parts. By default, the report generates for the last 30 days with all other filters filtered to {All}.

To access the 'Web Quotes by Part' report, select 'Web' >> 'Quotes' >> 'By Part' from the drop-down menu.

Start Date: 12/13/2023 End Date: 1/24/2024

Customer: {All} Site: {All}

Category: {All} Currency: Canadian Dollar

1 of 1

100%

Web Quotes by Part

Start Date: 12/13/2023 End Date: 1/24/2024 Category: {All} Location: MAIN

Customer: {All} Site: {All}

Part	Qty	Total Quoted	Converted Value	Converted %	Quote %
8100SH - SINGLE HUNG	5	\$674.53	\$674.53	100.00%	12.54%
PTSTUP - CUSTOM PAINT SETUP	1	\$25.00	\$25.00	100.00%	0.46%
SURCHARGE - SURCHARGE	1	\$337.30	\$337.30	100.00%	6.27%
SURCHARGE BY OUNCE - Surcharge by Ounce	1	\$4,339.85	\$4,339.85	100.00%	80.68%
SURCHARGE BY POUND - Surcharge by Pound	1	\$2.09	\$2.09	100.00%	0.04%
Totals	9	\$5,378.77	\$5,378.77		

The following information is available on the 'Web Quotes by Option Value' report:

- **O** – Links to the 'Web Quotes by Option' report for this particular part.
- **Part** – Description of the part generated in FeneVision Web.
- **Qty** – Number of units quoted that contain the specific part.
- **Total Quoted** – Entire dollar amount of quotes that contain the specific part.
- **Converted Value** – Valuation of Web quotes that were converted to orders.
- **Converted %** – Percentage of total quote valuation that was converted to orders. Converted value divided by 'Total Quoted'.
- **Quote %** – Percentage of the all quote valuation that contain the specific part. The part 'Total Quoted' divided by 'Total Quoted' for all parts.

Web Quotes by Person

The 'Web Quotes by Salesperson' report outlines information regarding quotes entered within the given date range in Web and organized by salesperson. By default, the report generates for the last 30 days.

To access the 'Web Quotes by Salesperson' report, select 'Web' >> 'Quotes' >> 'By Person' from the drop-down menu.

Start Date: 11/1/2023 End Date: 1/25/2024

Currency: Canadian Dollar

1 of 1

100%

Web Quotes by Salesperson

Start Date: 11/1/2023 End Date: 1/25/2024 Location: MAIN

Salesperson	Qty	Total Quoted	Converted Value	Converted %	Quote %
{None}	12	\$6,123.08	\$5,378.77	87.84%	36.15%
kost, kost	7	\$4,733.93	\$1,134.15	23.96%	27.95%
Zurcher, Dylan	6	\$6,080.70	\$0.00	0.00%	35.90%
Totals	25	\$16,937.71	\$6,512.92		

The following information is available on the 'Web Quotes by Salesperson' report:

- **Q** – Links to the 'Web Quotes' report for the specific salesperson.

- **Salesperson** – Name of the salesperson.
- **Qty** – Quantity of items quoted by the specific salesperson.
- **Total Quoted** – Entire dollar amount of salesperson’s quotes.
- **Converted Value** – Valuation of Web quotes that were converted to orders.
- **Converted %** – Percentage of total quote valuation that was converted to orders. Converted value divided by ‘Total Quoted’.
- **Quote %** – Percentage of the all quote valuation for the specific salesperson. The salesperson ‘Total Quoted’ divided by ‘Total Quoted’ for all salespeople.

Web Quotes by Quote

The ‘Web Quotes’ report outlines information regarding quotes entered within the given date range in Web. By default, the report generates for the last 30 days with all other filters filtered to {All}.

To access the ‘Web Quotes by Quote’ report, select ‘Web’ >> ‘Quotes’ >> ‘By Quote’ from the drop-down menu.

Start Date:	<input type="text" value="11/2/2023"/>		End Date:	<input type="text" value="1/25/2024"/>	
Salesperson:	{All} ▾		Customer:	{All} ▾	
Site:	{All} ▾				
Currency:	Canadian Dollar ▾				

		<input type="text" value="1"/>	of 1					<input type="text" value="100%"/>		
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Web Quotes

Start Date: 11/2/2023 End Date: 1/25/2024 Salesperson: {All} Location: MAIN
Customer: {All} Site: {All}

Quote	Status	Qty	Total Quoted	Converted Value	Converted %	Quote %
22	Available	2	\$3,599.78	\$0.00	0.00%	32.52%
23	Available	2	\$744.31	\$0.00	0.00%	6.72%
24	Available	1	\$0.00	\$0.00	0.00%	0.00%
25	Available	3	\$213.92	\$0.00	0.00%	1.93%
26	Uploaded (ROE)	5	\$1,134.15	\$1,134.15	100.00%	10.24%
27	Uploaded (ROE)	9	\$5,378.77	\$5,378.77	100.00%	48.58%
Totals		22	\$11,070.93	\$6,512.92		

The following information is available on the ‘Web Quotes’ report:

- **Quote** – Quote number generated in Web.
- **Status** – Indicated whether the quote is ‘Available’, ‘On Hold’, ‘Uploaded’, or ‘Expired’.
 - **Available** – Quote is available for uploading in FeneVision Web.
 - **On Hold** – Quote is on hold according to policies set up in Core.
 - **Uploaded** – Quote has been uploaded to ‘Order’ status in FeneVision Web.
 - **Expired** – Quote has expired according to the expiration date generated in FeneVision Web.
- **Qty** – Number of units quoted.
- **Total Quoted** – Entire dollar amount of the quote.
- **Converted Value** – Valuation of Web quote that was converted to an order.
- **Converted %** – Percentage of total quote valuation that was converted to order. Converted value divided by ‘Total Quoted’.
- **Quote %** – Percentage of the all quote valuation. The specific quote ‘Total Quoted’ divided by ‘Total Quoted’.

Web Quotes by MTD / YTD

The 'Quotes by MTD / YTD' reports detail information regarding valuation comparison between quotes entered over two different years.

- By Category MTD/YTD
- By Customer MTD/YTD
- By Option MTD/YTD
- By OptionValue MTD/YTD
- By Part MTD/YTD
- By Salesperson MTD/YTD

Web Quotes by Category MTD / YTD

The 'Web Quotes by Category MTD / YTD' report displays month-to-date and year-to-date quote valuation figures grouped by product category, for quotes entered within the given date range. By default, the report generates for the current month and year based on the date the report is run.

To access this report, go to 'Web >> 'Quotes MTD / YTD' >> 'By Category MTD / YTD'.

Date:

Currency:

Navigation: 1 of 1 100%

Web Quotes by Category MTD/YTD

Date: 12/29/2023 Location: MAIN

Category	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
P Stacks & Mulls	\$0.00	\$0.00	0.00%	\$0.00	\$64,789.61	100.00%
P Bay/Bow	\$0.00	\$0.00	0.00%	\$0.00	\$22,192.62	100.00%
P Misc	\$0.00	\$4,677.15	100.00%	\$0.00	\$7,025.57	100.00%
P 8000 Series Windows	\$0.00	\$674.53	100.00%	\$0.00	\$6,891.06	100.00%
P	\$0.00	\$27.09	100.00%	\$0.00	\$411.19	100.00%
P QA - Design Zone Products	\$0.00	\$0.00	0.00%	\$0.00	\$168.92	100.00%
Totals	\$0.00	\$5,378.77	100.00%	\$0.00	\$101,478.97	100.00%

The following information is available on the 'Web Quotes by Category MTD / YTD' report:

- **P** – Link to the 'Web Quote by Part MTD / YTD' report.
- **Category** – Product category.
- **MTD** – Reflects total quote valuation from the category for the selected month to date.
 - **Previous year** – Reflects total quote valuation from the first of the month to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from the first of the month to the selected date for the selected year.

- **Comparison** – Percentage change in quote valuation between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that quotes from this category have increased 50% from the previous year over the same month.
- **YTD** – Reflects total quote valuation from the category for the selected year to date.
 - **Previous year** – Reflects total quote valuation from January 1st to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from January 1st to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that quotes from this category have increased 50% from the previous year at the selected date.

Web Quotes by Customer MTD / YTD

The 'Web Quotes by Customer MTD / YTD' report details each customer's quote value, for quotes entered within the given date range, filtered by a specific date with a comparison to the previous year's month (to date) or compared to the previous year (to date). By default, the report generates for the current month and year based on the date the report is run.

To access the 'Web Quotes by Customer MTD / YTD' report, go to 'Web' >> 'Quotes by MTD / YTD' >> 'By Customer MTD / YTD'.

Web Quotes by Customer MTD/YTD
 Date: 12/14/2023 Location: MAIN

Customer	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
P O Atom Annealing	\$0.00	\$0.00	0.00%	\$0.00	\$63,898.00	100.00%
P O ABC Windows[10]	\$0.00	\$0.00	0.00%	\$0.00	\$16,547.14	100.00%
P O ABC Windows[8]	\$0.00	\$5,378.77	100.00%	\$0.00	\$10,131.51	100.00%
P O Design Zone[33]	\$0.00	\$0.00	0.00%	\$0.00	\$8,824.90	100.00%
P O ABC Windows[9]	\$0.00	\$0.00	0.00%	\$0.00	\$2,077.42	100.00%
Totals	\$0.00	\$5,378.77	100.00%	\$0.00	\$101,478.97	100.00%

The following information is available on the 'Web Quotes by Customer MTD / YTD' report:

- **Customer** – Customer name.
- **MTD** – Month-to-date.
 - **Previous year** – Reflects total quote valuation from the first of the month to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from the first of the month to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that quotes from this category have increased 50% from the previous year over the same month.
- **YTD** – Year-to-Date.
 - **Previous year** – Reflects total quote valuation from January 1st to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from January 1st to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that quotes from this category have increased 50% from the previous year at the selected date.

Web Quotes by Option MTD / YTD

The 'Web Quotes by Option MTD / YTD' report displays month-to-date and year-to-date quote valuations figured grouped by options selected, for quotes entered within the given date range. By default, the report generates for the current month and year based on the date the report is run with all filters set to {All}.

Users can access the 'Sales by Option MTD / YTD' report in the following ways:

1. Select 'Web' >> 'Quotes MTD / YTD' >> 'By Option MTD / YTD'.
2. In the 'Web Quotes by Customer MTD / YTD' report, select the 'O' link.
3. In the 'Web Quotes by Item MTD / YTD' report, select the 'Item' link.
4. In the 'Web Quotes by Option MTD / YTD' report, select the 'P' link to view the report for that specific option.

Date:	12/30/2023	Customer:	{All}
Site:	{All}	Part:	{All}
Part Suffix:	{All}	Option:	{All}
Currency:	Canadian Dollar		

1 of 1		100%
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Web Quotes by Option MTD/YTD

Date: 12/30/2023 Location: MAIN

Option	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
P ARG-ARGON GAS	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
P BB30DG-30 DEGREES	\$0.00	\$0.00	0.00%	\$0.00	\$243.24	100.00%
P BG-BEIGE	\$0.00	\$0.00	0.00%	\$0.00	\$33.78	100.00%
P CH-CHERRY	\$0.00	\$38.58	100.00%	\$0.00	\$38.58	100.00%
P CHOC-CHOCOLATE	\$0.00	\$101.35	100.00%	\$0.00	\$101.35	100.00%
P EPSTK-STOCK EXTERIOR PAINT	\$0.00	\$3.85	100.00%	\$0.00	\$3.85	100.00%
P HEADEX-HEAD EXPANDER	\$0.00	\$33.78	100.00%	\$0.00	\$130.86	100.00%
P NF-NAIL FIN	\$0.00	\$270.27	100.00%	\$0.00	\$976.36	100.00%
P NS-NO SCREEN	\$0.00	\$0.00	0.00%	\$0.00	-\$16.22	100.00%
P WH-WHITE	\$0.00	\$0.00	0.00%	\$0.00	\$13.52	100.00%
Totals	\$0.00	\$481.62	100.00%	\$0.00	\$1,929.80	100.00%

The following information is available in the 'Sales by Option MTD / YTD' report:

- **P** – Links to the 'Web Quotes by Option MTD / YTD' report for the individual option. This will display a breakdown of the parts ordered that have the option rather than all options ordered.
- **OV** – Links to the 'Web Quotes by Option Value MTD / YTD' report.
- **Option** – Option code and description of the option applied to the item.
- **MTD** – Reflects total quote valuation containing this option for the selected month to date.
 - **Previous year** – Reflects total quote valuation from the first of the month to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from the first of the month to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.
- **YTD** – Reflects total quote valuation containing this option for the selected year to date.
 - **Previous year** – Reflects total quote valuation from January 1st to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from January 1st to the selected date for the selected year.
 - **Comparison** – Percentage change in the quote valuation between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.

By Option MTD / YTD (for individual option)

The 'Web Sales by Option MTD / YTD' report for an individual option is accessed by selecting the P link in the 'Web Sales by Option MTD / YTD' report for the date indicated or by viewing the report for all options and selecting an option from the 'Option' filter.

Date: 12/30/2023 Customer: {All} Site: {All} Part: {All} Part Suffix: {All} Option: ARG - ARGON GAS Currency: Canadian Dollar

1 of 1 100%

Web Quotes by Option MTD/YTD

Date: 12/30/2023 Location: MAIN

Part	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
P 8000PW-PICTURE WINDOW	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
P 8100SH-SINGLE HUNG	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
P 8220SL-TWO-LITE SLIDER	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
P 8510CS-CASEMENT	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
P 8660DH-DOUBLE HUNG	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
P DES-PW-PICTURE WINDOW	\$0.00	\$33.78	100.00%	\$0.00	\$404.47	100.00%
Totals	\$0.00	\$202.70	100.00%	\$0.00	\$2,426.80	100.00%

The information available in this report matches that available on the 'Web Sales by Option MTD / YTD' report only it's grouped by part instead of option.

Web Quotes by Option Value MTD / YTD

The 'Web Quotes by Option Value MTD / YTD' report displays month-to-date and year-to-date quote valuation figured grouped by option values selected, for quotes entered within the given date range. By default, the report generates for the current month and year based on the date the report is run with all filters set to {All}.

Users can access the 'Sales by Option Value MTD / YTD' report in the following ways:

1. Select 'Web' >> 'Quotes MTD / YTD' >> 'By Option Value MTD / YTD'.
2. In the 'Web Quotes by Option MTD / YTD' report, select the 'OV' link.

Web Quotes by Option Value MTD/YTD

Date: 3/5/2020 Location: MAIN

Option	Option Value	MTD			YTD		
		2019	2020	Comparison	2019	2020	Comparison
WG- VICTORIAN V-GROOVE	2vx2HC	\$0.00	\$0.00	0.00%	\$0.00	\$525.00	100.00%
CMR- CHOOSE FOR ORIELS	15.375	\$0.00	\$0.00	0.00%	\$0.00	\$360.00	100.00%
TTSR- TWO TONE STANDARD RECTANGULAR	3vx2HC	\$0.00	\$0.00	0.00%	\$39.00	\$0.00	-100.00%
SG- SOLID COLOR GEORGIAN	2vx2HC	\$0.00	\$0.00	0.00%	\$25.34	\$0.00	-100.00%
H-S-J- HEAD, SEAT & JAMBS	Width 120 in. or Less	\$324.00	\$0.00	-100.00%	\$324.00	\$0.00	-100.00%
H-S-J- HEAD, SEAT & JAMBS	Width 120 in. or less	\$203.51	\$0.00	-100.00%	\$861.64	\$0.00	-100.00%
H-S-J- HEAD, SEAT & JAMBS	Width 120 in. or Less	\$0.00	\$0.00	0.00%	\$614.26	\$0.00	-100.00%

The following information is available on the 'Web Quotes by Option Value MTD / YTD' report:

- **Option** – Option selected for the item.
- **Option Value** – Option value selected.
- **MTD** – Reflects total quote valuation containing this option value for the selected month to date.

- **Previous year** – Reflects total quote valuation from the first of the month to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from the first of the month to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.
- **YTD** – Reflects total quote valuation containing this option value for the selected year to date.
 - **Previous year** – Reflects total quote valuation from January 1st to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from January 1st to the selected date for the selected year.
 - **Comparison** – Percentage change in the quote valuation between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.

Web Quotes by Part MTD / YTD

The 'Web Quotes by Part MTD / YTD' report details the quotes for each part, for quotes entered within the given date range, filtered by a specific date with a comparison to the previous year's month (to date) or compared to the previous year (to date). By default, the report generates for the current month and year based on the date the report is run with all filters set to {All}.

To access the 'Web Quotes by Part MTD / YTD' report, go to 'Web' >> 'Quotes by MTD / YTD' >> 'By Part MTD / YTD'.

Date:	<input type="text" value="5/31/2023"/>	Customer:	<input type="text" value="{All}"/>
Category:	<input type="text" value="{All}"/>	Site:	<input type="text" value="{All}"/>
Currency:	<input type="text" value="Canadian Dollar"/>		

1 of 1		100%
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Web Quotes by Part MTD/YTD						
Date: 5/31/2023 Location: MAIN						
Part	MTD			YTD		
	2022	2023	Comparison	2022	2023	Comparison
○ 8013BAY - 3-LITE BAY	\$0.00	\$10,955.00	100.00%	\$0.00	\$10,955.00	100.00%
○ OPENING - NON-TEMPLATE OPENING	\$0.00	\$2,173.46	100.00%	\$0.00	\$2,173.46	100.00%
○ TWINDHCF - Continuous Frame Twin Double Hung	\$0.00	\$2,077.42	100.00%	\$0.00	\$2,077.42	100.00%
○ 8015BOW - 5-LITE BOW	\$0.00	\$1,804.05	100.00%	\$0.00	\$1,804.05	100.00%
○ 8000PW - PICTURE WINDOW	\$0.00	\$1,466.62	100.00%	\$0.00	\$1,466.62	100.00%
○ 33184SURCHARGE - 33184	\$0.00	\$143.00	100.00%	\$0.00	\$143.00	100.00%
○ PTSTUP - CUSTOM PAINT SETUP	\$0.00	\$5.00	100.00%	\$0.00	\$5.00	100.00%
Totals	\$0.00	\$18,624.56	100.00%	\$0.00	\$18,624.56	100.00%

The following information is detailed in the 'Web Quotes by Part MTD / YTD' report:

- **Part** – Name and description of the part.
- **MTD** – Month-to-date.
 - **Previous year** – Reflects total quote valuation from the first of the month to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from the first of the month to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.
- **YTD** – Year-to-Date.
 - **Previous year** – Reflects total quote valuation from January 1st to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from January 1st to the selected date for the selected year.

- **Comparison** – Percentage change in the quote valuation between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.

Web Quotes by Salesperson MTD / YTD

The 'Web Quotes by Person MTD / YTD' report displays month-to-date and year-to-date of quote valuation figures grouped by salesperson, for quotes entered within the given date range. By default, the report generates for the current month and year based on the date the report is run.

To access this report, select 'Web' >> 'Quotes MTD / YTD' >> 'By Salesperson MTD / YTD'.

Person	MTD			YTD		
	2021	2022	Comparison	2021	2022	Comparison
curry, tom	\$3,955.08	\$0.00	-100.00%	\$9,171.64	\$0.00	-100.00%
Wilson, Brett	\$468.55	\$0.00	-100.00%	\$468.55	\$0.00	-100.00%
Totals	\$4,423.63	\$0.00	-100.00%	\$9,640.19	\$0.00	-100.00%

The following information is available on the 'Web Quotes by Person MTD / YTD' report:

- **Person** – Name of the salesperson.
- **MTD** – Reflects total quote valuation from the salesperson for the selected month to date.
 - **Previous year** – Reflects total quote valuation from the first of the month to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from the first of the month to the selected date for the selected year.
 - **Comparison** – Percentage change in quote valuation between the first of the month and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.
- **YTD** – Reflects total quote valuation from the salesperson for the selected year to date.
 - **Previous year** – Reflects total quote valuation from January 1st to the selected date for the previous year.
 - **Selected year** – Reflects total quote valuation from January 1st to the selected date for the selected year.
 - **Comparison** – Percentage change in the quote valuation between January 1st and the selected date from the previous year to the selected year; e.g., 50% means that the quotes for this customer have increased 50% from the previous year over the same month.

Remote Order Log

The 'Remote Order Log' report will display a list of orders uploaded through remote order entry during a specified date range. This report helps to identify how often customers are using web and uploading quotes into Core. By default, the report generates for the last day with all customers and sites selected.

To access the 'Remote Order Log' report, select 'Remote' >> 'Remote Order Log'.

Start Date:	<input type="text" value="10/2/2023"/>	End Date:	<input type="text" value="1/25/2024"/>
Customer:	<input type="text" value="{All}"/>	Site:	<input type="text" value="{All}"/>
<p>Navigation: 1 of 1 Refresh Back Forward 100% Save Print Search</p>			
Remote Order Log			
Start Date:	10/2/2023	End Date:	1/25/2024
Customer:	{All}	Location:	MAIN
		Site:	{All}
Order	Order Date	Customer	Remote Order
11412	10/24/2023	Design Zone[33]	7
11415	10/25/2023	Design Zone[33]	8
11418	10/25/2023	Design Zone[33]	9
11424	10/25/2023	Design Zone[33]	10
11431	10/26/2023	Design Zone[33]	11
11434	10/27/2023	ABC Windows[8]	13
11437	10/30/2023	Atom Annealing	16
11469	11/8/2023	Atom Annealing	26
11563	12/14/2023	ABC Windows[8]	27

The following information is available on the 'Remote Order Log' report:

- **Order** – Alphanumeric identifier of the order.
- **Order Date** – Date the order was entered or uploaded from Web.
- **Customer** – Customer name.
- **Remote Order** – Number of remote orders entered in that date range for the specific customer.

Web Approvals

The 'Web Approvals' report shows all orders that had web approval holds approved during the specified date range. This report helps to identify what types of holds are being added to web quotes and when they are being approved. By default, the report generates for the last 7 days with all hold policies checked.

To access the 'Web Approvals' report, select 'Web' >> 'Web Approvals'.

Start Date: 12/14/2023 End Date: 1/25/2024

Hold Policy: Customer Placed On Hold,Custome

1 of 1 100%

Web Approvals

Start Date: 12/14/2023 End Date: 1/25/2024 Location: MAIN

Customer	Order	Type	Status	Hold Policy	Date Approved	Approved By	Notes
ABC Windows[8]	11563	Order	Available	Inventory Shortage	12/14/2023 9:20:07 AM	Jaba, Swapnil	HDWR. Keeper - LOCK KEEPER, REIN.MTG RAIL - MEETING RAIL REINFORCEMENT, REIN.SHSASH - SINGLE HUNG SASH REINFORCEMENT, SCREW.8X.375PPH - SCREW, SCREW.8X1.5PPH - MEETING RAIL ANCHOR SCREW TO R, SCREW.8X1PFH - MEETING RAIL ANCHOR SCREW TO F, VA4027CH - SCREEN RETAINER SILL CHERRY
Atlantic Installers[28]	11564	Order	Released	Inventory Shortage	12/14/2023 9:24:30 AM	Jaba, Swapnil	almTestPart - BM38513, H-KEEPER - Keeper, H-LOCK - Lock, VA4027DO - SCREEN RETAINER SILL DARK OAK, VA4286DO - MULL 1/8 IN, VA4363DO - DRIP CAP, VA4705DO - GLAZING BEAD 7/8 DARK OAK, VA4776DO - SILL ADAPTER DARK OAK, VF9861DO - PW FRAME / SH HEAD DARK OAK, VF9863DO - JAMB DARK OAK
	11562	Order	Released	Inventory Shortage	12/14/2023 9:15:47 AM	Jaba, Swapnil	VA4705DO - GLAZING BEAD 7/8 DARK OAK, VF9861DO - PW FRAME / SH HEAD DARK OAK

The following information is available on the 'Web Approvals' report:

- **Customer** – Customer name.
- **Order** – Alphanumeric identifier of the order. Links to the 'Order Status' report.
- **Type** – Order type, 'Order', 'Quote', 'Credit', 'Invoice Only', 'Manufacturing', or 'Forecast'.
- **Status** – Order status of specific order, 'Available', 'On Hold', 'Released', etc.
- **Hold Policy** – Type of hold policy. Configured in FeneVision Core.
- **Date Approved** – Date in which hold was approved.
- **Approved By** – Person approving the hold.
- **Notes** – Additional details associated with the hold for that customer.

BI Map

Below is a map of the structure of BI. The link to get to each sub report is indicated in parenthesis.

Orders

- **Order Search**
- **Order History**
 - **Order Status (Order)**
 - **Order Status (Order)**
 - **Invoice History (invoice Date)**
 - **Order Status (Order)**
 - **Shipping History (Route)**
 - **Order Status (Order)**
 - **Route Orders (Route)**
 - **Shipping History (Order)**
 - **Shipping Details (Details)**
 - **Addresses (Addresses)**
 - **Order Status (Order)**
 - **Order Purchasing Requirements (Purchasing Requirements)**
 - **Order Status (Order)**
 - **Order Production Status (Production Status)**
 - **Order Status (Order)**

- **Unit Bill of Materials (Unit)**
 - **Order Status (Order-Item)**
 - **Part Attributes (Attributes)**
 - **Unit Bill of Materials (Part or Subpart)**
- **Unit Details (Status)**
 - **Order Status (Order-Item)**
 - **Opti Rack Details (Rack-Slot)**
 - **Schedule Orders (Schedule)**
 - **Order Production Status (Order)**
 - **Unit Details (Unit)**
 - **Order Production Status (Order-Item)**
 - **Opti Release Summary (Release)**
 - **Opti Release Details (Release)**
 - **Opti Release Summary (Release)**
 - **Opti Release Racks (Racks)**
 - **Opti Release Summary (Release)**
 - **Schedule Orders (Schedule)**
 - **Opti Rack Details (Rack)**
 - **Schedule Orders (Schedule)**
 - **Unit Details (Unit)**
 - **Order Production Status (Order-Item)**
 - **Opti Release Summary (Release)**
 - **Lot Number Search (Lot Number)**
 - **Order Status (Order-Item)**
 - **Container Details (Container)**
 - **Order Status (Order-Item)**
 - **Unit Details (Status)**
 - **Container Details (Plant Location)**
 - **Containers or Container Details (Containers)**
 - **Order Containers (Container Status)**
 - **Order Status (Order)**
 - **Container Details (Shipping Container)**
 - **Related Orders (Related Orders)**
 - **Order Status (Order)**
 - **Shipping History (Route)**
 - **Order Production Status (Schedule)**
 - **Order Capacity Status (Capacity Status)**
 - **Order Status (Order)**
 - **Line Item History (Item)**
 - **Order Status (Order-Item)**
 - **Unit Details (Sched-Unit)**
 - **Line Item Bill of Materials (Item)**
 - **Order Status (Order-Item)**
 - **Item Part Attributes (Attributes)**
 - **Line Item Bill of Materials (Part or Subpart)**
 - **Order Status (Order-Item)**
 - **Item Part Attributes (Attributes)**
 - **Line Item Bill of Materials (Part or Subpart)**
 - **Item Price Breakdown (Price)**
 - **Order Status (Order-Item)**
 - **Order Notes (Order Notes)**
 - **Order Status (Order Number)**
 - **Unassigned Serialized Inventory On Sales Order**

Purchasing

- **Purchase Order Search**
- **Purchase Document History**
 - **Purchase Document Status (Document)**
 - **Addresses (Address)**
 - **Purchase Document Status (Document Number)**
 - **Related Documents (Related Documents)**
 - **Purchase Document Status (Document Number)**
 - **Receipts (Receipts)**
 - **Purchase Document Status (Document Number)**
 - **Item Price Breakdown (Total)**
 - **Purchase Document Status (Document-Item)**
 - **Purchase Order Notes (Purchase Documents Notes)**
 - **Purchase Document Status (Document Number)**
 - **Uninvoiced Receipts**
 - **Receipts (Receipt)**
 - **Purchase Document Status (Document Number)**
 - **Purchase Document Status (PO Number)**
 - **Uninvoiced Receipt Details**
 - **Receipts (Receipt)**
 - **Purchase Document Status (Document Number)**

Production

- **Schedules**
 - **Schedule Orders (ID)**
 - **Order Production Status (Order)**
 - **Schedule Batches (Batch)**
 - **Schedule Batch Details (Batch ID)**
 - **Unit Bill of Materials (Unit)**
 - **Order Production Status (Order-Item)**
 - **Unit Details (Status)**
- **Incomplete Items Details/Summary**
 - **Order Status (Order-Item)**
 - **Order Production Status (Sched-Unit)**
 - **Unit Details (Status)**
- **Incomplete Items by Work Cells**
 - **Work Cell Item Details (Order-Item)**
 - **Order Production Status (Order-Item)**
 - **Unit Details (Status)**
- **Order Completion Status**
 - **Order Status (Order)**
- **Work Cell Activity By Customer**
- **Work Cell Activity By Date**
- **Work Cell Activity By Product**
- **Work Cell Events**
- **Product Produced**
- **Reject Count by Unit**
- **Containers**
 - **Container Details (Container)**
- **Containers Ready for Pickup**
- **Container Location**
- **Lot Number Search**
 - **Order Status (Order-Item)**
- **Opti Releases**
 - **Opti Release Summary (Release)**

- Opti Release Details (Release)
- Opti Release Summary (Release)
 - Opti Release Racks (Racks)
 - Opti Release Summary (Release)
 - Schedule Orders (Schedule)
 - Opti Rack Details (Rack)
 - Schedule Orders (Schedule)
 - Unit Details (Unit)
 - Order Production Status (Order-Item)
 - Opti Release Summary Release)
 - Opti Release Details (Part)

Shipping

- Routes
 - Route Orders (Route ID)
 - Shipping History (Order)
- Unshipped Orders
 - Order Status (Order)
- Unshipped Items
 - Order Status (Order-Item)
- Loading Status
 - Unit Details (Part)

RMA

- RMA by Customer
 - RMA by Item (Customer)
 - RMA by Disposition (Part)
- RMA by Item
 - RMA by Disposition (Part)
- RMA by Disposition
- RMA by Status
 - RMA Status (RMA number)
 - Order Status (Order)
- RMA Credit vs Non Credit
 - RMA Status (RMA Number)
 - Order Status (Order)

Management

- Order Entry Employee Metrics
- Order Entry Order Metrics
 - Order Status (Order)
- Order Entry Category Metrics
- Order Entry Part Metrics
- Quotes History
 - Order Status (Quote)
- Quote Conversion
- Quote Reject History
- Average Discount by Part
- Price Exceptions
 - Order Status (Order)
- Sales by Category
 - Sales by Item (I)
- Sales by Customer
 - Sales by Item (I)
 - Sales by Option (O)

- Sales by Invoice (IN)
- Sales by Invoice
 - Invoice History (Invoice)
 - Order Status (Order)
 - Order Status (Order)
- Sales by Item
 - Sales by Option (Item)
- Sales by Options Value
- Sales by Option
 - Sales by Option (P)
 - Sales by Option Value (OV)
- Sales by Salesperson
 - Sales by Invoice (IN)
- Sales by Category MTD/YTD
 - Sales by Item MTD/YTD (I)
- Sales by Customer MTD/YTD
 - Sales by Item (I)
 - Sales by Option MTD/YTD (O)
- Sales by Item MTD/YTD
 - Sales by Option MTD/YTD (Item)
- Sales by Option MTD/YTD
 - Sales by Option MTD/YTD (P)
 - Sales by Option Value MTD/YTD (OV)
- Sales by Option Value MTD/YTD
- Sales by Person MTD/YTD
- Orders Open
 - Order Status (Order)
- Work in Process
 - Order Status (Order)
- Work in Process Detailed
 - Order Status (Order-Item)
- Finished Goods
 - Order Status (Order)
- Finished Goods Detailed
 - Order Status (Order)
- Purchasing
 - PO Reject History
- Orders Open by Category
 - Orders Open (Category)

Performance

- Invoiced Elapsed Days
 - Order Status (Order)
- Completed Elapsed Days
 - Order Status (Order)
- Shipped Elapsed Days
 - Order Status (Order)
- On Time Delivery
 - Order Status (Order)
- Reject Reasons
 - Lot Number Search (Lot Number)
- Lineal Optimization
- Max Opti Analysis

Web

- **Web Quotes by Category**
 - **Web Quotes by Part (P)**
- **Web Quotes by Customer**
 - **Web Quotes by Part (P)**
 - **Web Quotes by Option (O)**
 - **Web Quotes (Q)**
- **Web Quotes by Option**
 - **Web Quotes by Part (P)**
 - **Web Quotes by Option Value (OV)**
- **Web Quotes by Option Value**
- **Web Quotes by Part**
 - **Web Quotes by Option (O)**
- **Web Quotes by Salesperson**
 - **Web Quotes (Q)**
- **Web Quotes**
- **Web Quotes by Category MTD/YTD**
 - **Web Quotes by Part MTD/YTD (P)**
- **Web Quotes by Customer MTD/YTD**
 - **Web Quotes by Part MTD/YTD (P)**
 - **Web Quotes by Option MTD/YTD (O)**
- **Web Quotes by Option MTD/YTD**
 - **Web Quotes by Option MTD/YTD (P)**
 - **Web Quotes by Option Value MTD/YTD (OV)**
- **Web Quotes by Option Value MTD/YTD**
- **Web Quotes by Part MTD/YTD**
 - **Web Quotes by Option (O)**
- **Web Quotes by Person MTD/YTD**
- **Remote Order Log**
 - **Order Status (Order)**
- **Web Approvals**
 - **Order Status (Order)**

Setup

BI reports are configured within the Core application. By default, the above listed reports can be accessed within BI. However, custom reports can be configured to be accessed in BI using the Core application. This can be done by assigning the proper 'BI' screen name to a report within the System >> Reports screen. See the FeneVision Core User Manual for additional steps to add custom reports to BI.

Reports

Screen Name: {All}

Screen Name	Menu Sequence	Menu Caption	Report Title	Report Path	Parameters	Show Parameters	Flags
BI\Management	1	Order Entry	Order Entry			<input type="checkbox"/>	0
BI\Management	2	Quotes	Quotes			<input type="checkbox"/>	0
BI\Management	3	Pricing	Pricing			<input type="checkbox"/>	0
BI\Management	4	Sales	Sales			<input type="checkbox"/>	0
BI\Management	4	Sales MTD/YTD	Sales MTD/YTD			<input type="checkbox"/>	0
BI\Management	5	Orders Open	Orders Open	OrdersOpen	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management	6	Work In Process	Work In Process			<input type="checkbox"/>	0
BI\Management	7	Finished Goods	Finished Goods			<input type="checkbox"/>	0
BI\Management	10	Purchasing	Purchasing			<input type="checkbox"/>	0
BI\Management	11	Orders Open By Category	Orders Open By Category	OrdersOpenByCategory	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management	12	Job Costing	Job Costing	JobCosting	location=<location>	<input checked="" type="checkbox"/>	64
BI\Management\Finished Goods	1	Summary	Finished Goods	FinishedGoods	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Finished Goods	2	Detailed	Finished Goods Detailed	FinishedGoodsDetailed	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Order Entry	1	Employee Metrics	Order Entry Employee Metrics	OrderEntryEmployeeMetrics	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Order Entry	2	Order Metrics	Order Entry Order Metrics	OrderEntryOrderMetrics	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Order Entry	3	Category Metrics	Order Entry Category Metrics	OrderEntryCategoryMetrics	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Order Entry	4	Part Metrics	Order Entry Part Metrics	OrderEntryPartMetrics	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Pricing	1	Average Discount by Part	Average Discount by Part	AverageDiscountByPart	location=<location>	<input checked="" type="checkbox"/>	0
BI\Management\Pricing	2	Price Exceptions	Price Exceptions	PriceExceptions	location=<location>	<input checked="" type="checkbox"/>	0

OK Cancel

Help

Users are able to access the most up-to-date user manuals from the FeneVision Core, Tracking, or Trucking applications. See the FeneVision Core user manual for additional steps to access the full user manual directory.