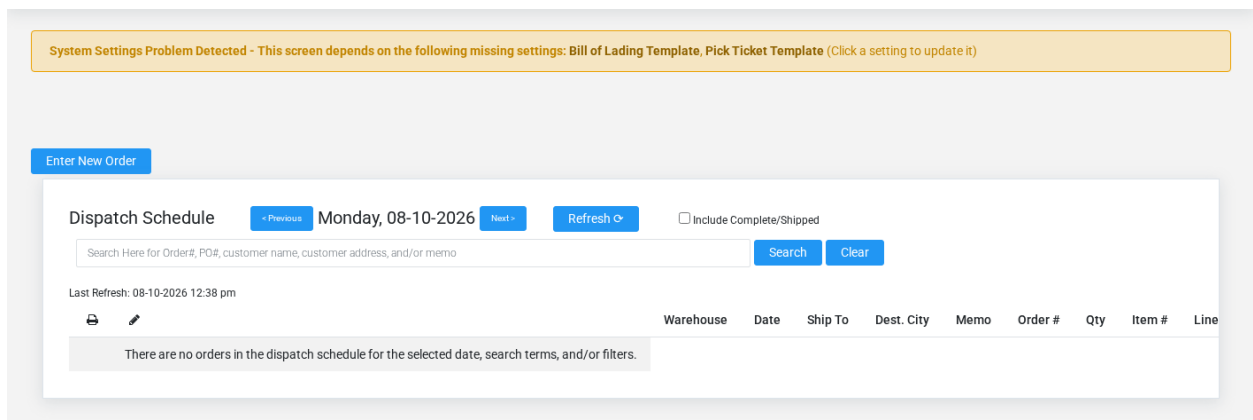


Manufacturing Orders

Manufacturing Orders

Purpose and when to use this record



The Manufacturing Orders overview screen in the Brisk documentation demo.

Plan requested production before execution, including the item, quantity, due date, priority, and selected formula.

At a glance

- **Identify it by: Order #, Order Date, Ship Date, and Status.**
- **Check its business context: Customer, Warehouse, Billing Address, Shipping Address, and Carrier.**
- **Why care:** Confirm item, formula, unit, warehouse, quantity, and production state together; mistakes can distort both material consumption and finished-goods cost.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on manufacturing orders. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Have valid **Customer**, **Billing Address**, and **Shipping Address** records ready first. Those selections determine where this Manufacturing Order belongs and which later screens can find it.

Create a Manufacturing Order

Create a Manufacturing Order only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Customer**, **Warehouse**, **Billing Address**, **Shipping Address**, and **Carrier**.
2. Enter the required identifying and operational values: **Order #**, **Customer**, **Order Date**, **Ship Date**, **Billing Address**, and **Shipping Address**.
3. Review **Freight Option**, and **Status** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Manufacturing Order, then confirm **Order #**, **Order Date**, **Ship Date**, and **Status** on its detail page before continuing.

After saving: Schedule or start the production run using the selected assembly/formula, then compare actual consumption and output with the order.

Delete a Manufacturing Order

Delete this Manufacturing Order only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Manufacturing Instances**, **Manufacturing Invoices**, **Order Freight Lines**, and **Order Line Items**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Order #**, **Order Date**, **Ship Date**, and **Status**. After confirmation, return to the Manufacturing Orders list and make sure only the intended Manufacturing Order was removed.

Review Manufacturing Order details

Use the detail page as the shared record of what this Manufacturing Order currently means. Verify **Order Date**, **Ship Date**, **Freight Option**, **Status**, **Subtotal**, and **Tax Total**, plus the remaining screen fields before relying on it for a decision.

Follow **Customer**, **Warehouse**, **Billing Address**, **Shipping Address**, and **Carrier** to determine whether the issue is on this Manufacturing Order or on one of those linked records.

Next check: Schedule or start the production run using the selected assembly/formula, then compare actual consumption and output with the order.

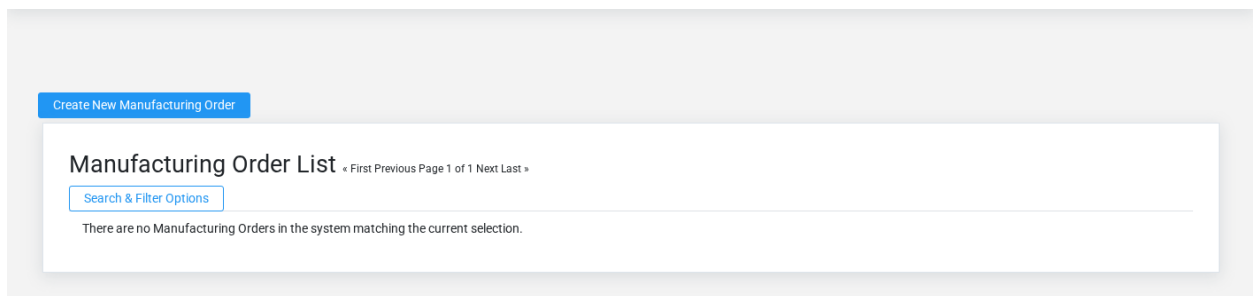
Edit an existing Manufacturing Order

Edit this Manufacturing Order to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Customer**, **Warehouse**, **Billing Address**, **Shipping Address**, and **Carrier** with the supporting document or approved request.
2. Recheck **Customer**, **Warehouse**, **Customer Po #**, **Order Date**, **Ship Date**, and **Freight Option**, plus the remaining screen fields. These values are most likely to change material demand, production status, output quantity, and cost.
3. Save the change, return to the list, and confirm that the Manufacturing Order now appears under the expected **Freight Option**, and **Status**.

After the change: Schedule or start the production run using the selected assembly/formula, then compare actual consumption and output with the order.

Find and review manufacturing orders



The Manufacturing Orders list screen in the Brisk documentation demo.

Use the Manufacturing Orders list to find the correct record before opening or changing it. Compare **Order #**, **Order Date**, **Ship Date**, and **Status**. Records with similar names or numbers can still belong to different **Customer**, **Warehouse**, **Billing Address**, **Shipping Address**, and **Carrier**.

- Keyword search checks **Memo**, **Display Name**, **Description**, **Name**, and **Item Code**.
- Narrow the list with **Customer** filters.
- The date filter uses **Ship Date**; choose a range that matches the business event you are reconciling.

Open the Manufacturing Order whose **Order #**, **Order Date**, **Ship Date**, and **Status** match the task. If it is missing, clear the list filters and recheck **Customer**, **Ship Date**, **Freight Option**, and **Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 18 user-relevant fields for this Manufacturing Order, including 5 linked-record selections and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Order #	Yes	An order's friendly name, used to identify the transaction in receipts, reports, and searches.
Customer	Yes	The customer that made this purchase.
Warehouse	No	The physical location from which inventory items for this order are sourced.
Customer Po #	No	Optionally record the customer's purchase order number.
Order Date	Yes	The date the order was placed.
Ship Date	Yes	The date that this order is scheduled to ship.
Billing Address	Yes	Select the billing address for this order.
Shipping Address	Yes	Select the shipping address for this order.
Freight Option	No	The freight option recorded for this manufacturing order. Available values: Line Item, Distributed, Other.
Freight Rate	No	Determines the dollar amount charged per weight unit on an order. Weight unit can be selected in the system settings.
Carrier	No	The carrier used for delivery.
Memo	No	An open text field for employees to make notes about this order.
Status	No	Order Status Information. Available values: On-Order, Complete, Cancelled.

Field	Required	What it controls
Subtotal	No	The total sales price of all line items before sales tax.
Tax Total	No	The total sales tax due for this sale.
Total	No	The total value recorded for this manufacturing order.
Order Weight	No	Total weight of all line items (in pounds).
Volume Discounts	No	The total amount of volume discounts from all line items.

What happens next

Schedule or start the production run using the selected assembly/formula, then compare actual consumption and output with the order.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Order #**, **Customer**, **Order Date**, **Ship Date**, **Billing Address**, and **Shipping Address** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Freight Option**, and **Status**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Customer**, **Warehouse**, **Billing Address**, **Shipping Address**, and **Carrier** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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