

Scheduled Manufacturing Instances

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Purpose and when to use this record

The screenshot shows a web interface for 'Scheduled Manufacturing Instances'. At the top, a yellow banner reads: 'System Settings Problem Detected - This screen depends on the following missing settings: Batch Sheet Template (Click a setting to update it)'. Below this is a blue button labeled 'Schedule New Batch'. The main section is titled 'Production Schedule' and includes navigation links: '< Previous', 'Tuesday, 08-11-2026', 'Next >', and a 'Refresh' button. There are dropdown menus for 'Product Type' (set to 'All') and 'Mixer' (set to 'All'), and a checkbox for 'Include Complete/Shipped'. A search bar contains the text 'Search Here for Order#, Item#, and/or Item Name' with 'Search' and 'Clear' buttons. Below the search bar, it says 'Last Refresh: 08-11-2026 08:01 am'. A table header is visible with columns: Warehouse, Seq #, Product #, Product Name, UOM, and Order #. The table body contains a single row with the text: 'There are no batches in the production schedule for the selected date, search terms, and/or product type.'

The Scheduled Manufacturing Instances overview screen in the Brisk documentation demo.

Reserve a future production run on the schedule before it becomes completed manufacturing activity.

At a glance

- **Identify it by:** **Date Entered**, **Status**, **Scheduled Date**, **Deadline**, and **Sequence Number**.
- **Check its business context:** **Blueprint**, **Warehouse**, **Container**, **Mfg. Report**, and **Parent Sale**.
- **Why care:** Confirm item, formula, unit, warehouse, quantity, and production state together; mistakes can distort both material consumption and finished-goods cost.

- **Why care:** Treat posted, processed, paid, reversed, and edit-locked states as controls—not ordinary descriptive fields. Confirm the source transaction before changing any state that the screen permits you to change.
- **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 scheduled manufacturing instances. 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 **Blueprint**, **Warehouse**, and **Manufacturinginstance Ptr** records ready first. Those selections determine where this Scheduled Manufacturing Instance belongs and which later screens can find it.

Create a Scheduled Manufacturing Instance

The screenshot shows a web form titled "Scheduled Manufacturing Instance Entry - New Scheduled Manufacturing Instance". At the top, there are four buttons: "Save", "Cancel", "< Previous", and "Next >". The form fields are arranged in two columns. The left column contains: "Blueprint" (with a plus icon), "Date Entered" (displaying "2026-8-10 12:38:57"), "Status" (a dropdown menu showing "Draft"), "Quantity per Batch", "Containers Used", and "Product Yield". The right column contains: "Warehouse" (a dropdown menu), "Scheduled Date" (displaying "MM/DD/YYYY"), "Batch Size", "Container" (with a plus icon), "Memo", and an empty text field.

The Scheduled Manufacturing Instances create screen in the Brisk documentation demo.

Create a Scheduled Manufacturing Instance only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Blueprint**, **Warehouse**, **Container**, **Mfg. Report**, **Parent Sale**, and **Manufacturinginstance Ptr**.
2. Enter the required identifying and operational values: **Blueprint**, **Warehouse**, and **Manufacturinginstance Ptr**.

3. Review **Status**, **Materials Consumed**, **Inventory Added**, and **Edit Locked** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Scheduled Manufacturing Instance, then confirm **Date Entered**, **Status**, **Scheduled Date**, **Deadline**, and **Sequence Number** on its detail page before continuing.

After saving: Open **Batch Export Records**, **Batch Import Records**, **Inventory Records**, and **Item Instances**, plus the remaining screen fields and confirm the Scheduled Manufacturing Instance appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Scheduled Manufacturing Instance

Delete this Scheduled Manufacturing Instance only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Batch Export Records**, **Batch Import Records**, **Inventory Records**, **Item Instances**, and **Item Rows**, plus the remaining screen fields. 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 **Date Entered**, **Status**, **Scheduled Date**, **Deadline**, and **Sequence Number**. After confirmation, return to the Scheduled Manufacturing Instances list and make sure only the intended Scheduled Manufacturing Instance was removed.

Review Scheduled Manufacturing Instance details

Use the detail page as the shared record of what this Scheduled Manufacturing Instance currently means. Verify **Date Entered**, **Status**, **Edit Locked**, **Scheduled Date**, and **Deadline** before relying on it for a decision.

Follow **Blueprint**, **Warehouse**, **Container**, **Mfg. Report**, **Parent Sale**, and **Manufacturinginstance Ptr** to determine whether the issue is on this Scheduled Manufacturing Instance or on one of those linked records.

Next check: Open **Batch Export Records**, **Batch Import Records**, **Inventory Records**, and **Item Instances**, plus the remaining screen fields and confirm the Scheduled Manufacturing Instance appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

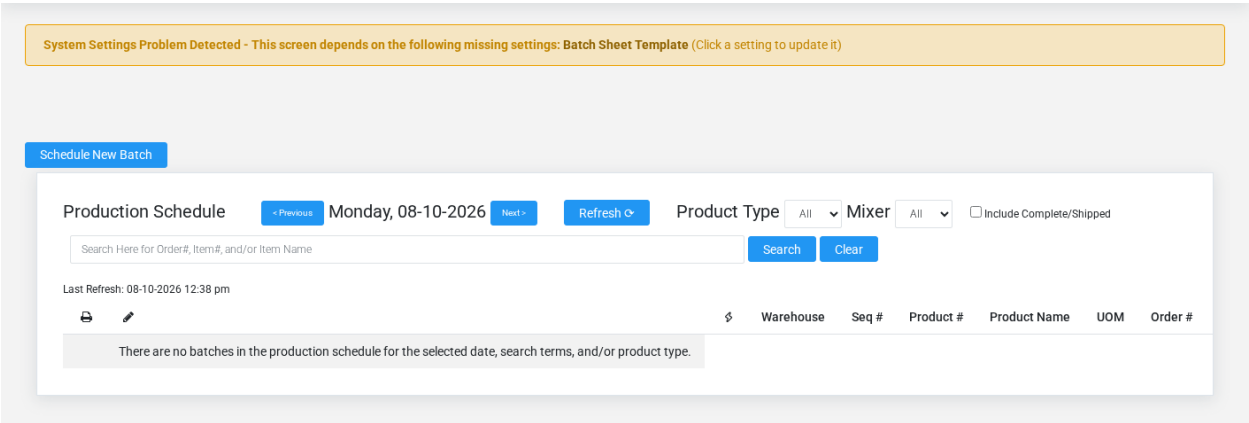
Edit an existing Scheduled Manufacturing Instance

Edit this Scheduled Manufacturing Instance when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Blueprint**, **Warehouse**, **Container**, **Mfg. Report**, **Parent Sale**, and **Manufacturinginstance Ptr** with the supporting document or approved request.
2. Recheck **Warehouse**, **Date Entered**, **Status**, **Unit Cost**, **Quantity Per Batch**, and **Edit Locked**, 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 Scheduled Manufacturing Instance now appears under the expected **Status**, and **Edit Locked**.

After the change: Open **Batch Export Records**, **Batch Import Records**, **Inventory Records**, and **Item Instances**, plus the remaining screen fields and confirm the Scheduled Manufacturing Instance appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review scheduled manufacturing instances



The Scheduled Manufacturing Instances list screen in the Brisk documentation demo.

Use the Scheduled Manufacturing Instances list to find the correct record before opening or changing it. Compare **Date Entered**, **Status**, **Scheduled Date**, **Deadline**, and **Sequence Number**. Records with similar names or numbers can still belong to different **Blueprint**, **Warehouse**, **Container**, **Mfg. Report**, **Parent Sale**, and **Manufacturinginstance Ptr**.

- Keyword search checks **Order #**, **Name**, and **Item Code**.
- Narrow the list with **Type**, and **Mixer** filters.
- The date filter uses **Scheduled Date**; choose a range that matches the business event you are reconciling.

Open the Scheduled Manufacturing Instance whose **Date Entered**, **Status**, **Scheduled Date**, **Deadline**, and **Sequence Number** match the task. If it is missing, clear the list filters and recheck **Type**, **Mixer**, **Scheduled Date**, **Status**, and **Edit Locked** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 20 user-relevant fields for this Scheduled Manufacturing Instance, including 6 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Blueprint	Yes	Links this Scheduled Manufacturing Instance to the selected Item Assembly; verify the relationship before saving.
Warehouse	Yes	The warehouse associated with this manufacturing instance.
Date Entered	No	Date and time recorded for date entered on this manufacturing instance.
Status	No	Current status of this manufacturing instance. Available values: Draft, Scheduled, Sequenced, In Manufacturing, Complete.
Unit Cost	No	The unit cost value recorded for this manufacturing instance.
Batch Size	No	For a scheduled instance, this is the requested amount of product to manufacture.
Quantity Per Batch	No	Manually override the batch size used on the batch sheet. Automatically calculated if left blank.

Field	Required	What it controls
Product Yield	No	Represents the actual amount of product yielded from the manufacturing process.
Container	No	Optionally sets the container used for this product (e.g. bags, boxes, crates).
Containers Used	No	Records the number of containers used in this instance.
Memo	No	The memo recorded for this manufacturing instance.
Materials Consumed	No	Whether the materials consumed option applies to this manufacturing instance.
Inventory Added	No	Whether the inventory added option applies to this manufacturing instance.
Edit Locked	No	Whether the edit locked option applies to this manufacturing instance.
Mfg. Report	No	Connects this manufacturing instance to a Manufacturing Report.
Parent Sale	No	If this instance was produced by the auto manufacture feature, records the sale that produced it.
Manufacturinginstance Ptr	Yes	Links this Scheduled Manufacturing Instance to the selected Manufacturing Instance; verify the relationship before saving.
Scheduled Date	No	Date and time recorded for scheduled date on this scheduled manufacturing instance.
Deadline	No	Date and time recorded for deadline on this scheduled manufacturing instance.
Sequence Number	No	For the given scheduled date, sets the numerical order in which manufacturing will be performed.

What happens next

Open **Batch Export Records**, **Batch Import Records**, **Inventory Records**, and **Item Instances**, plus the remaining screen fields and confirm the Scheduled Manufacturing Instance appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Blueprint**, **Warehouse**, and **Manufacturinginstance Ptr** 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 **Status**, and **Edit Locked**, 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 **Blueprint**, **Warehouse**, **Container**, **Mfg. Report**, **Parent Sale**, and **Manufacturinginstance Ptr** 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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