Order Processing Guide

Easy Automation, Inc. User Guide
Last Updated October 22, 2024

TOTALLY INTEGRATED SOLUTION

TABLE OF CONTENTS (CTRL + click to go directly to item)

OPENING PROGRAMS

Either double click on the icons on the desktop OR click the windows key in the lower left corner and look in your apps for the programs.

On log in screen for each respective program, enter username and password, click "Submit."
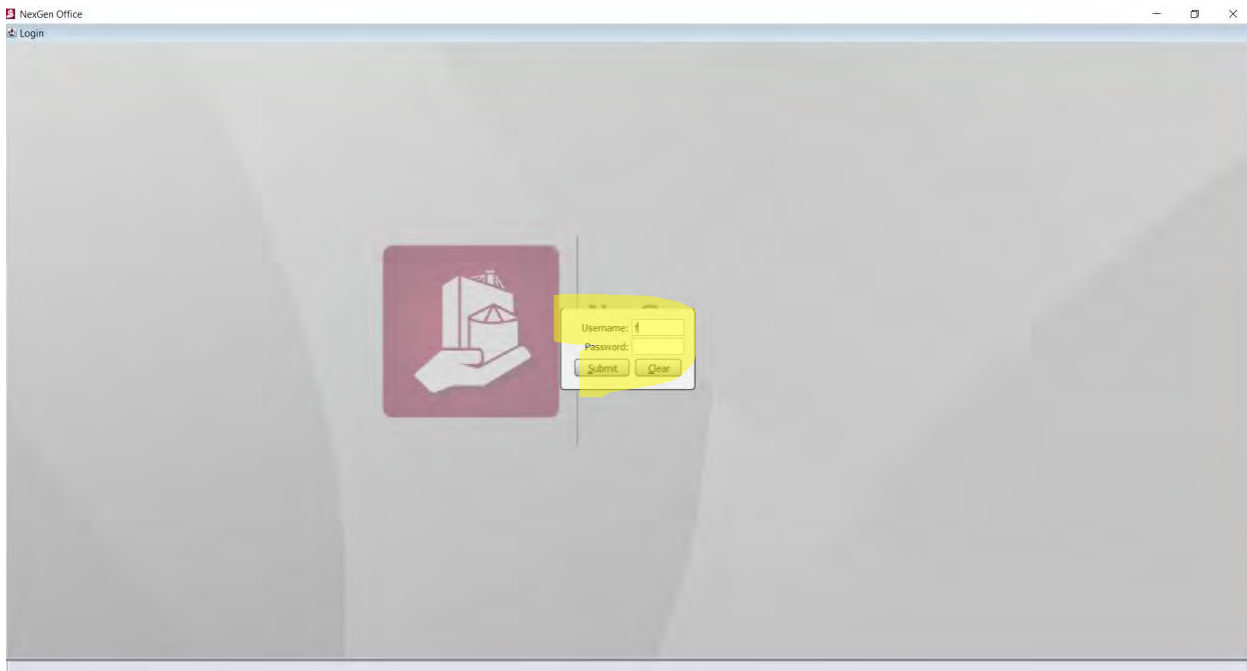
ORDER PROCESSING IN NEXGEN OFFICE

Depending on your setup, you may receive orders through preorders, or you may be creating the orders directly in NGO. Both methods are shown below.
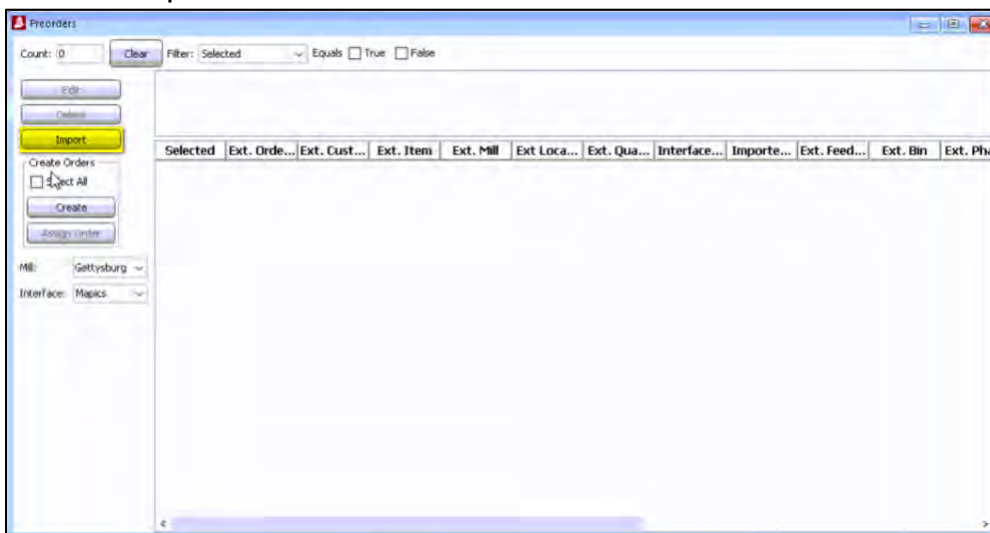
Preorders

Depending on your settings, you may have preorders that import automatically, create automatically, and/or send automatically. This guide shows how to manually do those things.
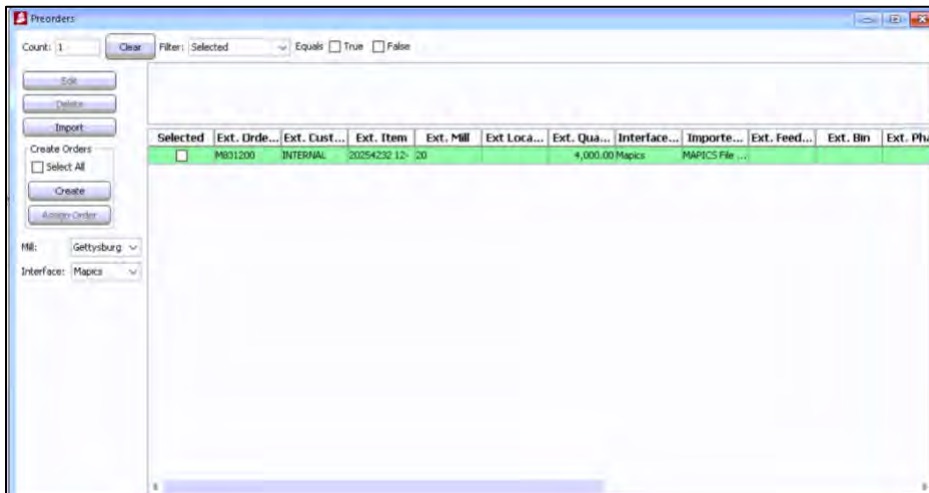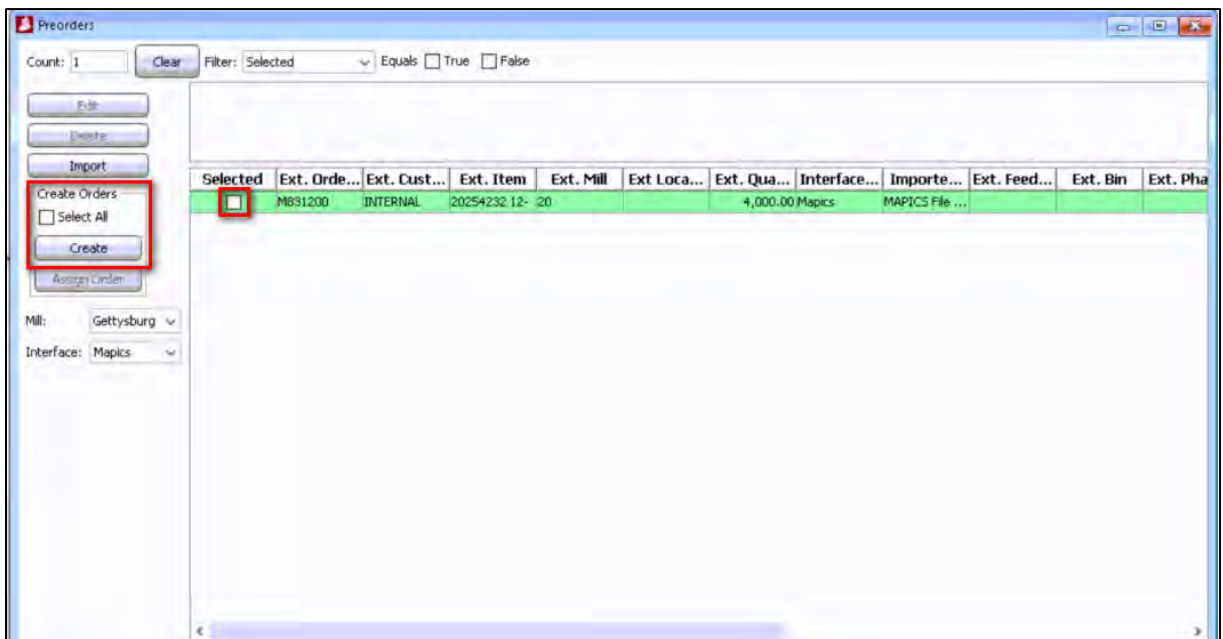
1. Open "Preorders."
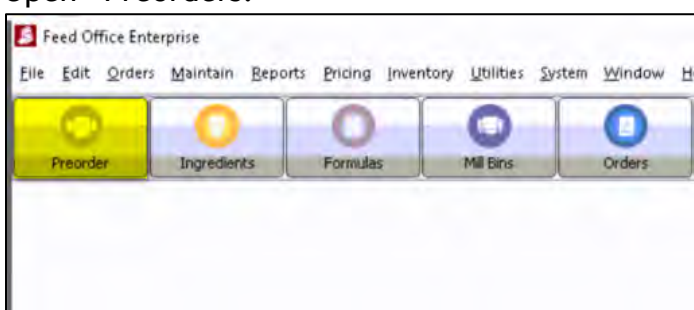
2. Choose "Import."

3. The order(s) will be imported.

4. If there are no warnings on the orders you can select all or check some of the orders and choose to create them from this screen without opening them to review the details. Any orders with warnings will not be created. Choose "Edit" on the left to open the order.
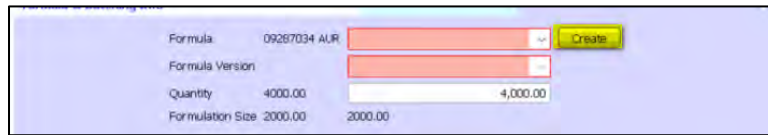
5. Orders that need to be reviewed can be edited, comments added, or items created as needed.
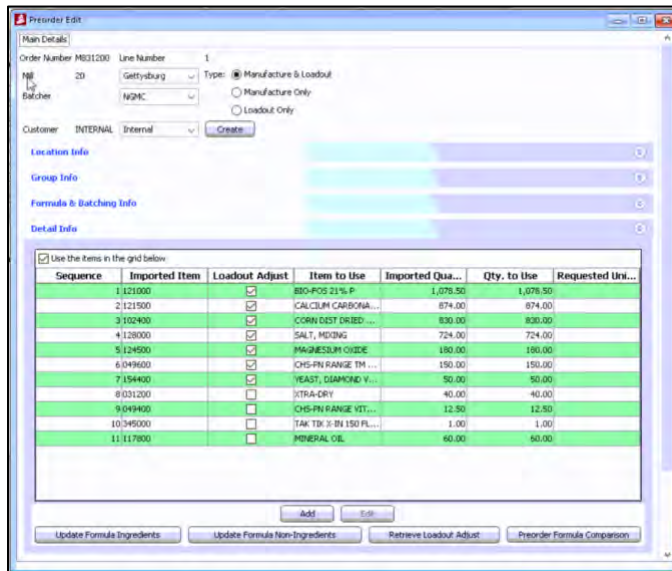
6. The first time a formula is imported, it needs to be created or associated with an existing formula. These items will be highlighted in red.
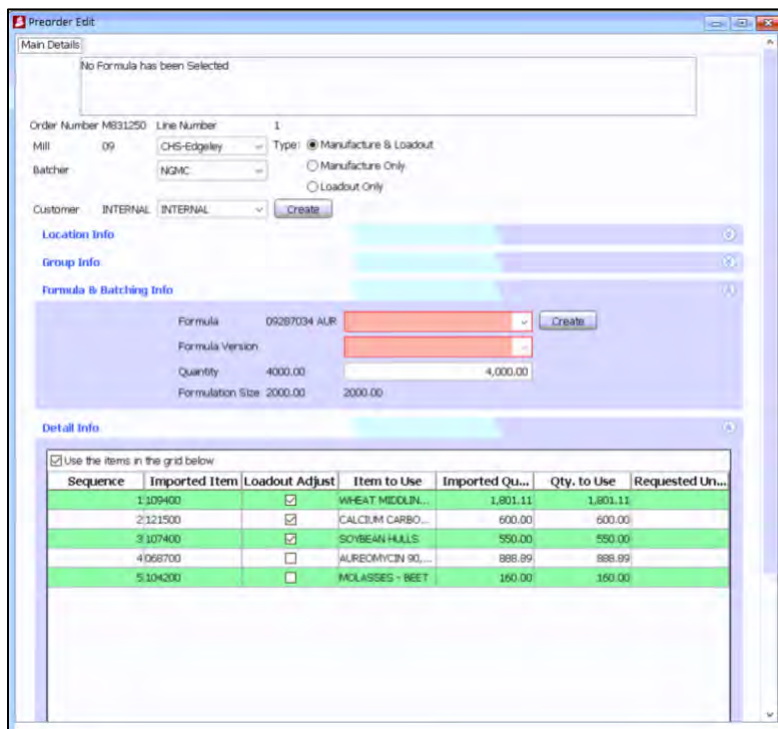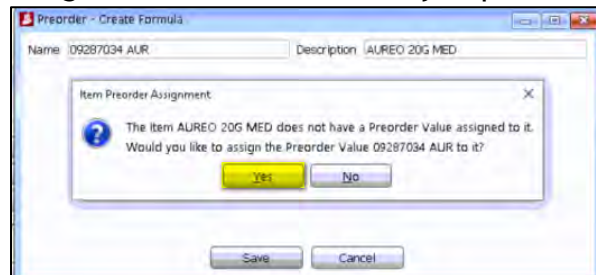
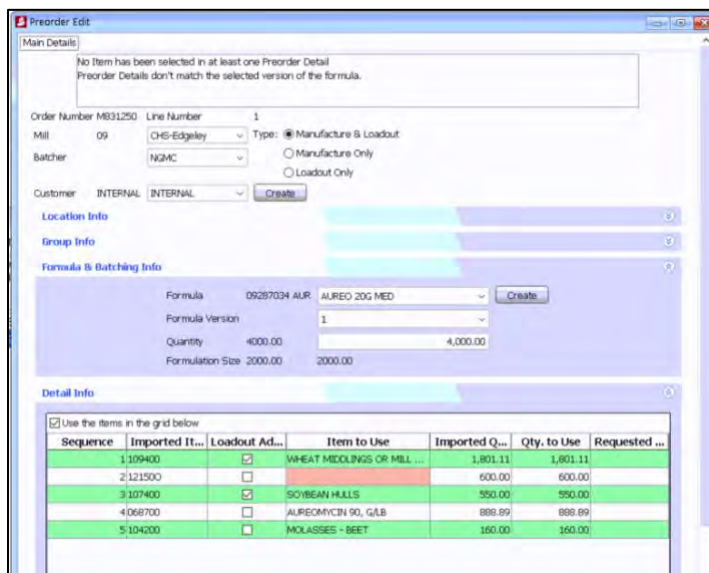a. For a formula that is new to the system click the "Create" button.

b. Make any changes to the name or description if needed and click "Save."

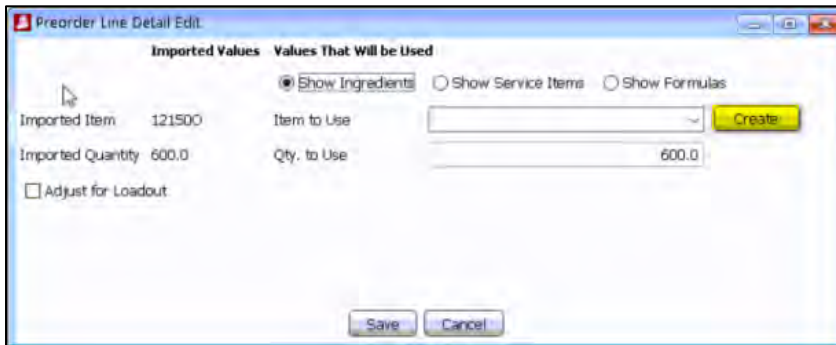   i. Assign a "Preorder Value" if you plan on using this item again.

7. If an item is not associated with an ingredient or service item, it will need to be added. These items will be highlighted in red. Double click it to edit.
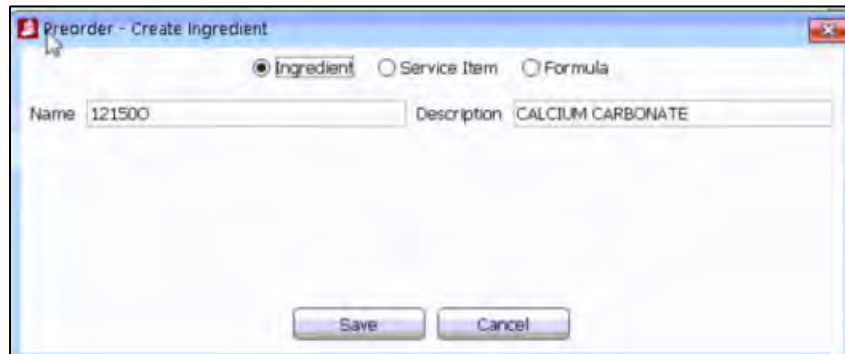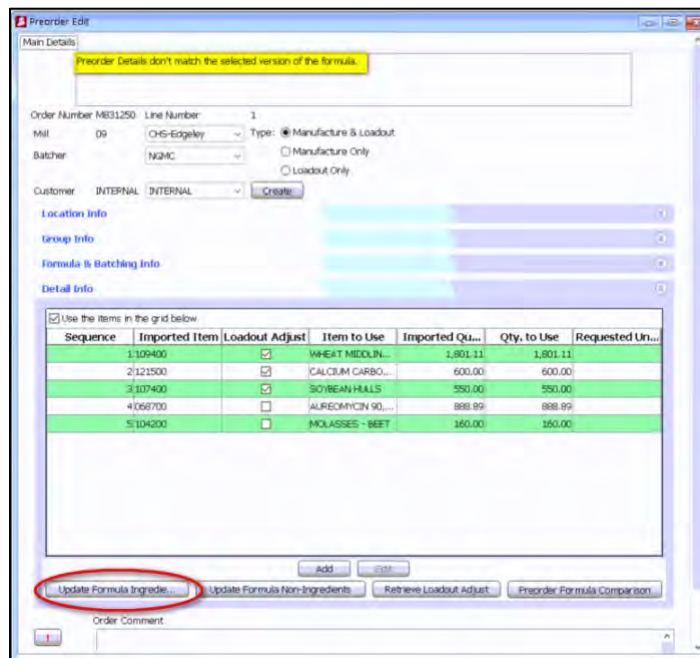
8. You will need to create the ingredient or link it to an existing ingredient.

a. Make any changes to the name or description if needed and click "Save."

b. After new items have been added it's suggested you update the stored formula in FOE.

9. Save the order or choose "Make Order" to send this ticket directly to the orders screen.
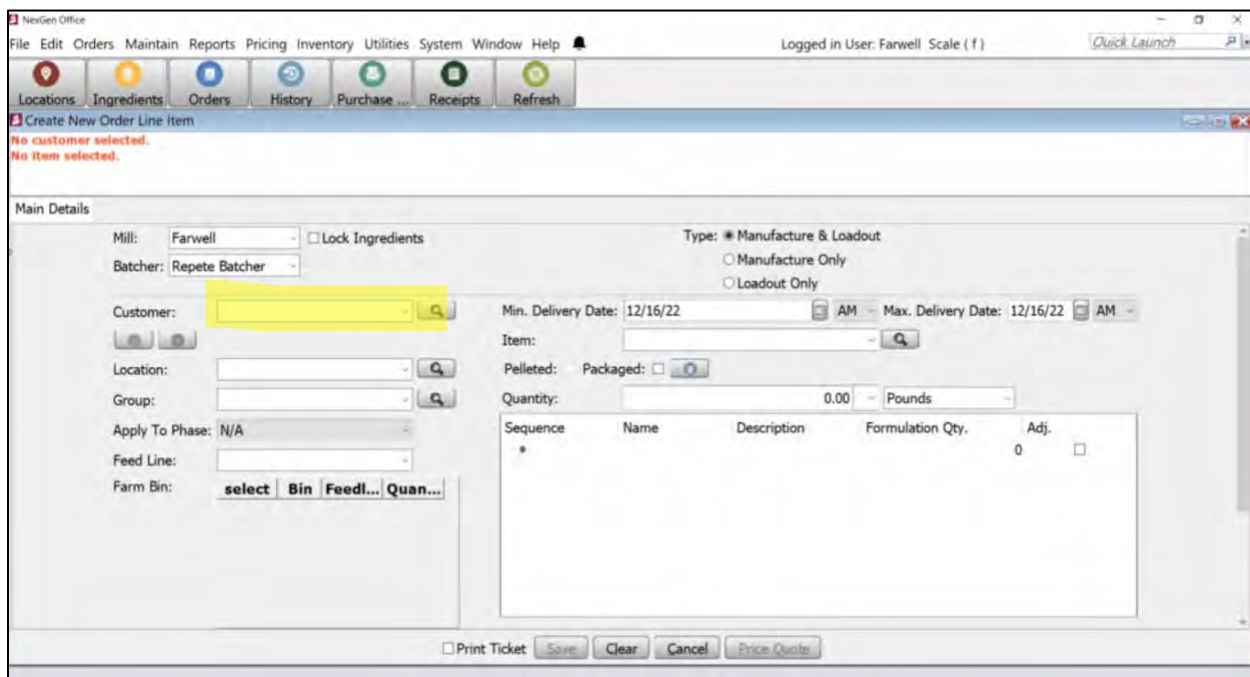
CREATE NEW ORDERS (MANUFACTURE / LOADOUT ORDERS)

In NexGen Office, click "Orders." On left side (or top), click "Create."
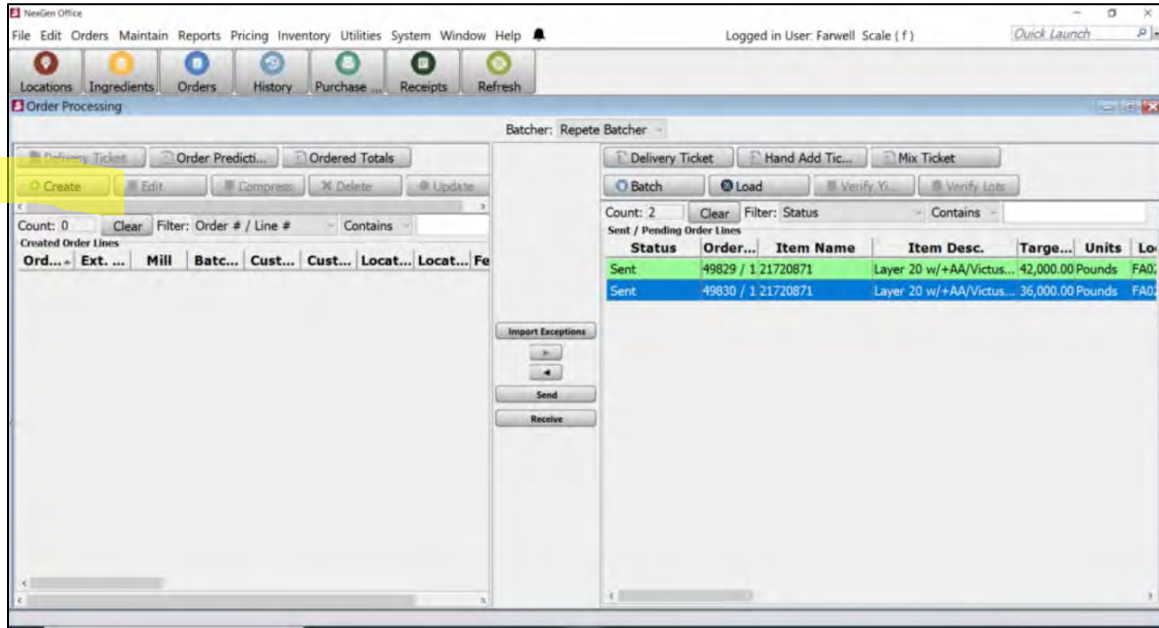
Select Customer, Location, Group, Feed Line, and/or Farm Bins as necessary (Customer is required).

If you use farm bins, enter the quantity in the quantity box by the farm bin you want and hit tab.

Select the item. Click the magnifying glass to see all the choices. Select the item and click "Select." OR it might be in the drop-down list (click the arrow) to click.
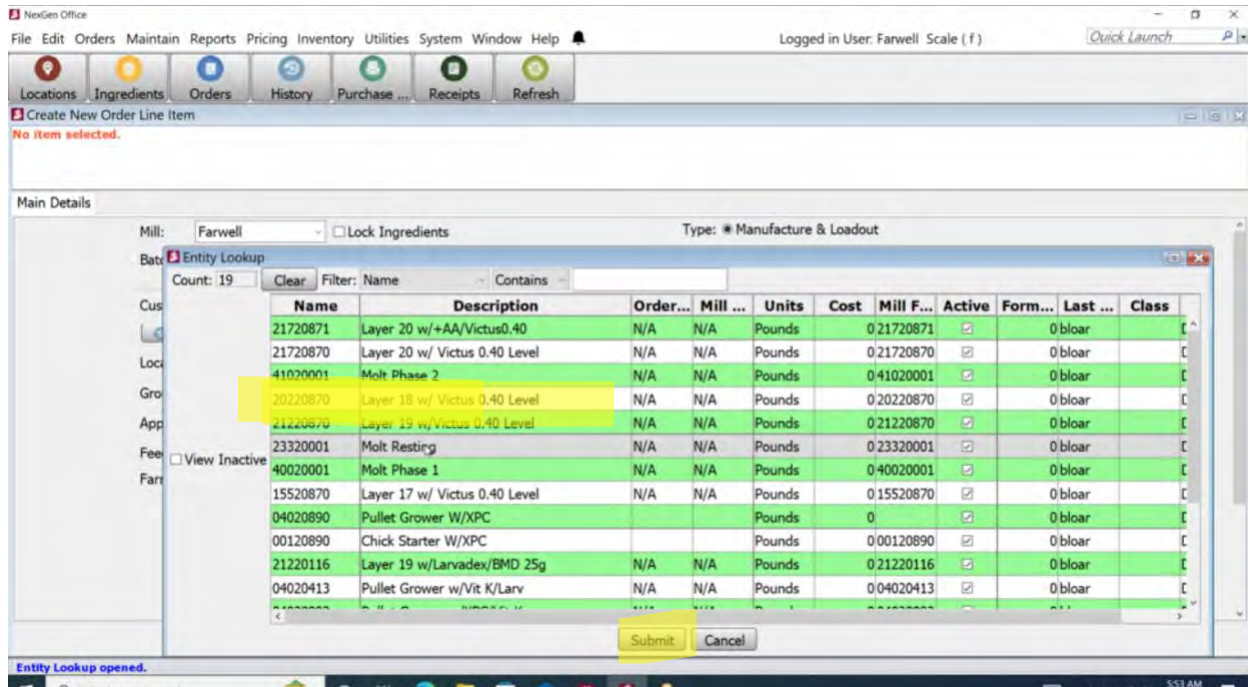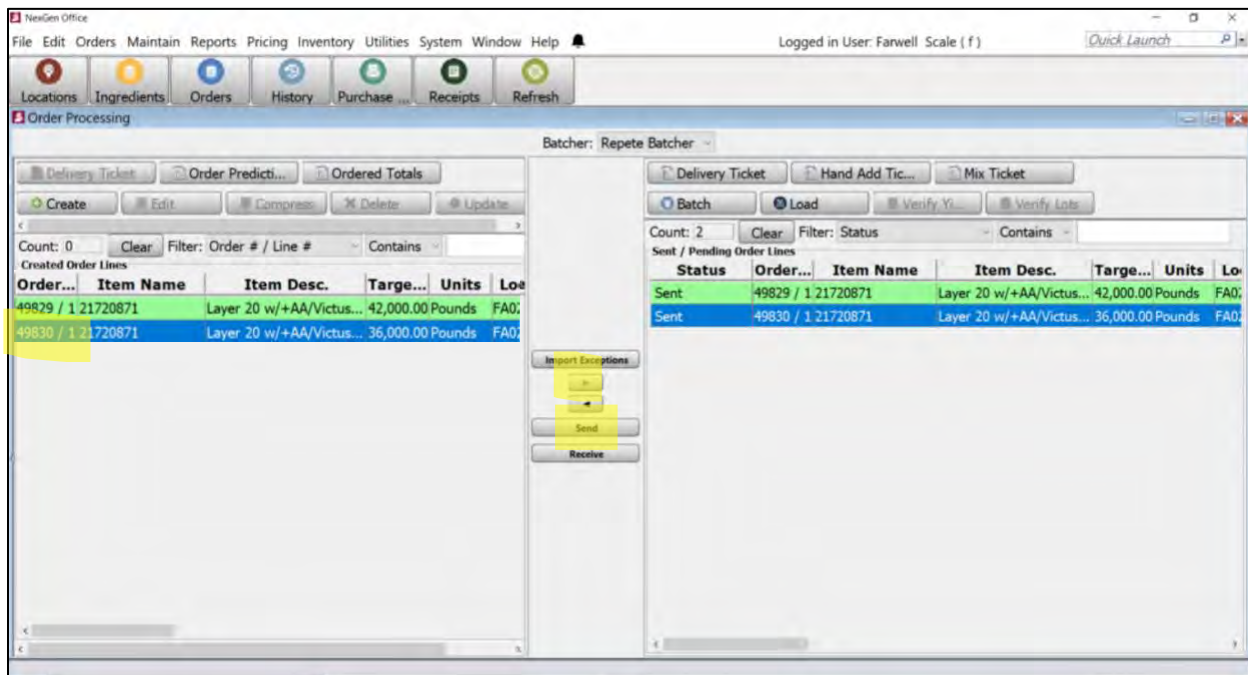

Depending on if you entered quantity in the farm bin section or not, you may need to put your quantity on the right side. **You should always check that the total quantity and the farm bin quantities match.** The program will warn you if it does not with a red message across the top.
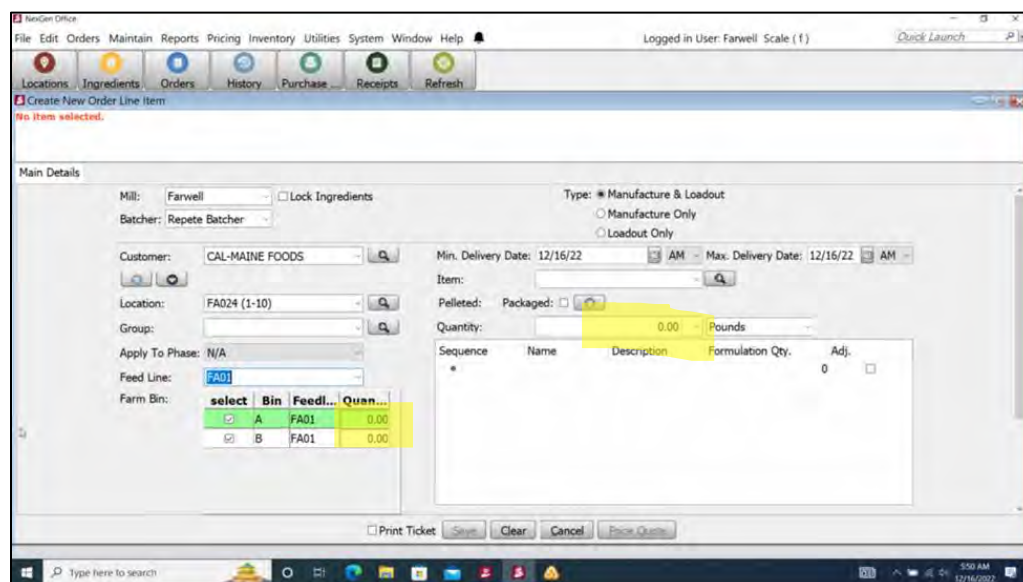
Fill out any other information you'd like, including min. / max. delivery dates, order comments, etc. at a minimum, customer, item, and quantity are required. Click "Save."

Back on the main orders screen, the order is now on the left/top side. If you are ready to send it to the batcher, then go on to the next step. If you are not ready to make it, you can let it sit there and create another new order if you want.

When ready to send it, click to highlight the order blue, then click the > arrow. Once it moves to the right side, it should change the status to "Sent" and will show up in NexGen Controller.

Once you log in, open the windows you want to see. Most commonly this will be the orders and batcher windows.
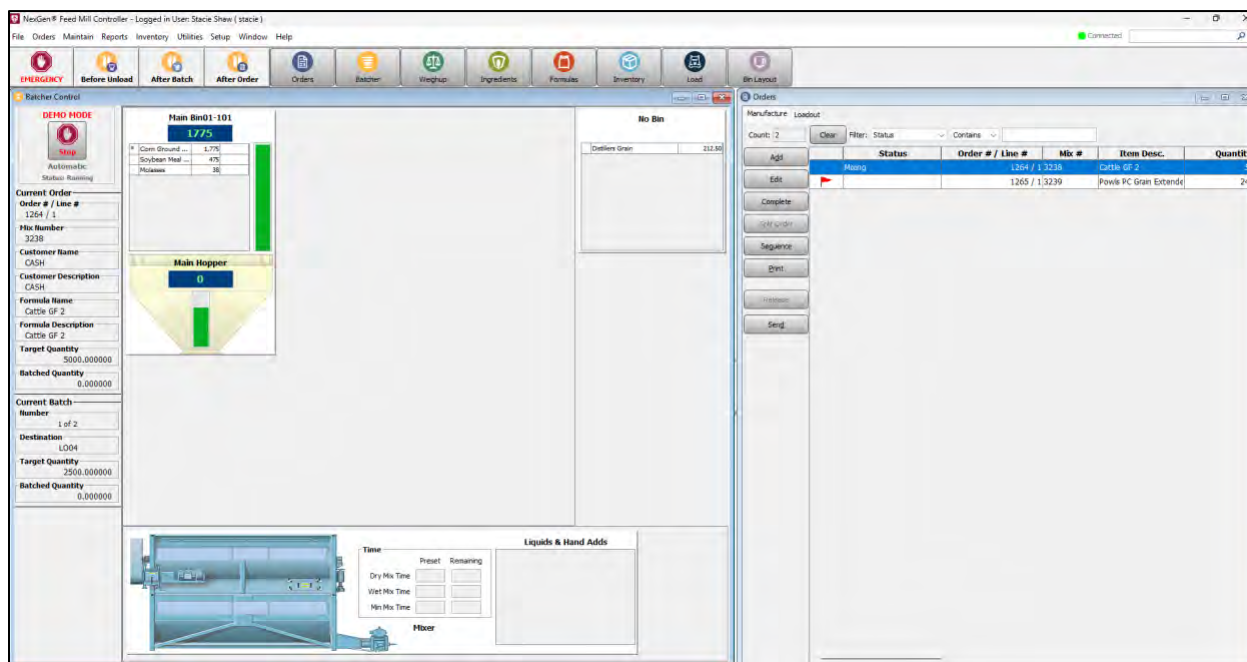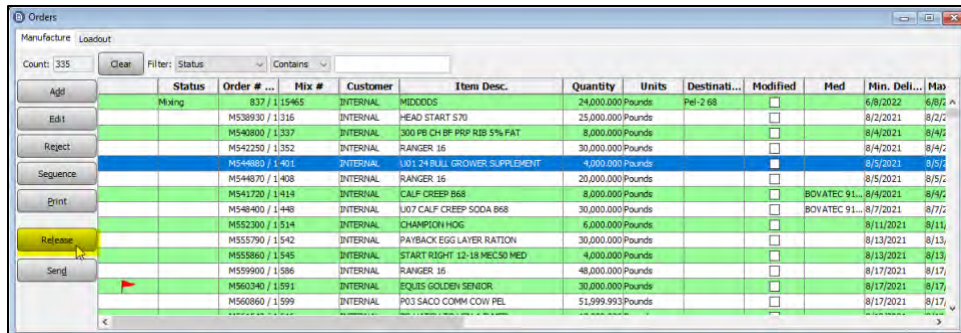
RELEASING AN ORDER
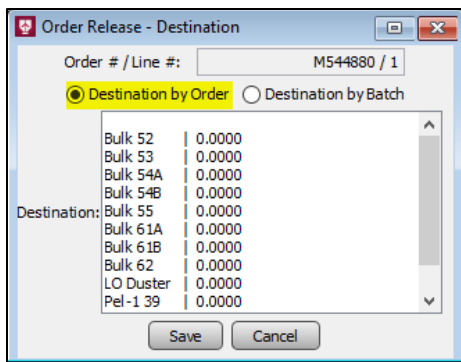
1. Open the "Orders" window.

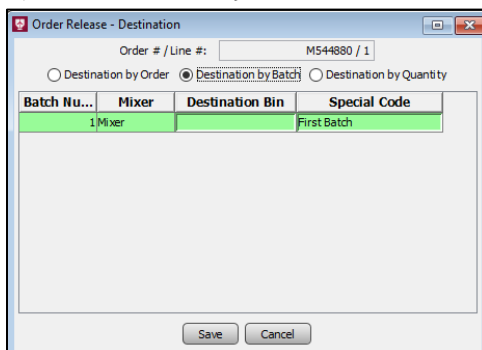2. Select the order (single click to turn it blue), then "Release."

3. There are 3 methods of choosing the destination. This will be controlled by the selection at the top of the "Order Release – Destination Window."

- o 1) Destination By Order – used to assign an order to a single destination.

- o 2) Destination By Batch – used to assign each batch to a specific destination.

- o 3) Destination By Quantity – used to assign a specific quantity to a specific destination. This ability may be unavailable due to equipment/setup limitations.

ASSIGNING BIN LOCATIONS

1. Open the "Ingredients" window.

2. Select the ingredient from list by either double clicking on it or selecting & press "Edit."

3. If the ingredient is moving from one location to another you will have to remove the desired location from the ingredient currently in that location. Then you can add that location to the new ingredient.
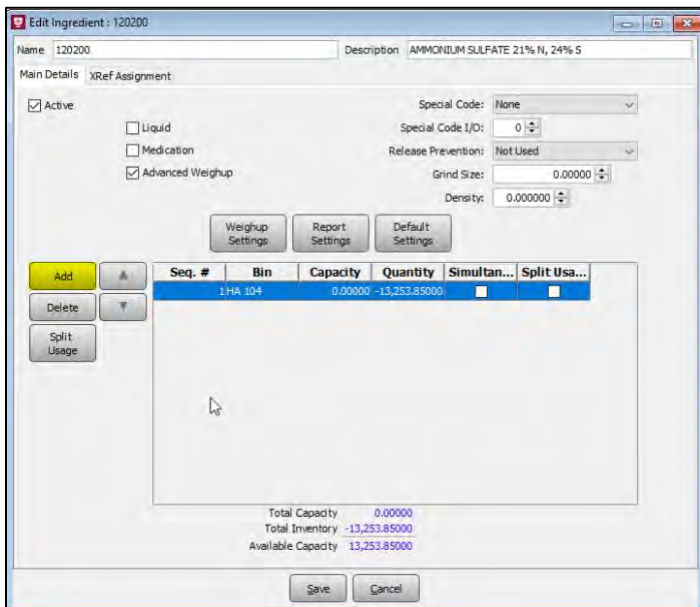
To Remove a Bin Location

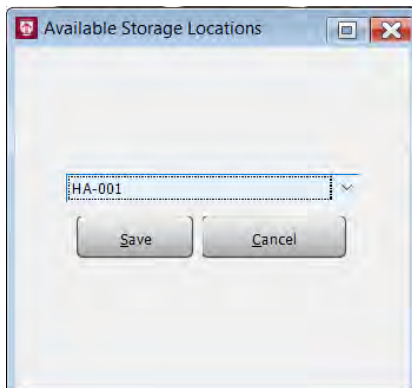Select (single click) the location & 'Delete' to remove.
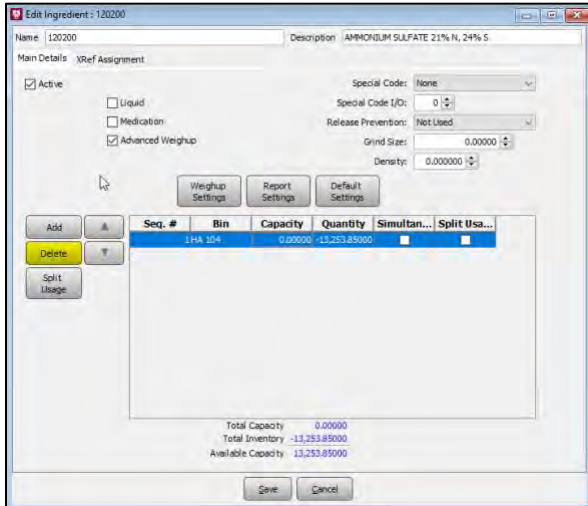
To Add a Bin Location

Use the "Add" button.

Choose the bin location from the drop-down menu & "Save." Only bin locations that are unassigned/available for use will be listed.

*NOTE: Once the location is set for the ingredient, weigh up settings need to be setup.

ADDRESSING ERRORS IN NEXGEN CONTROLLER

Errors will show up in the Batcher Event Log.

![EAI Easy Automation Inc. logo]

Item Runout / Substitution

Double click on event in table.
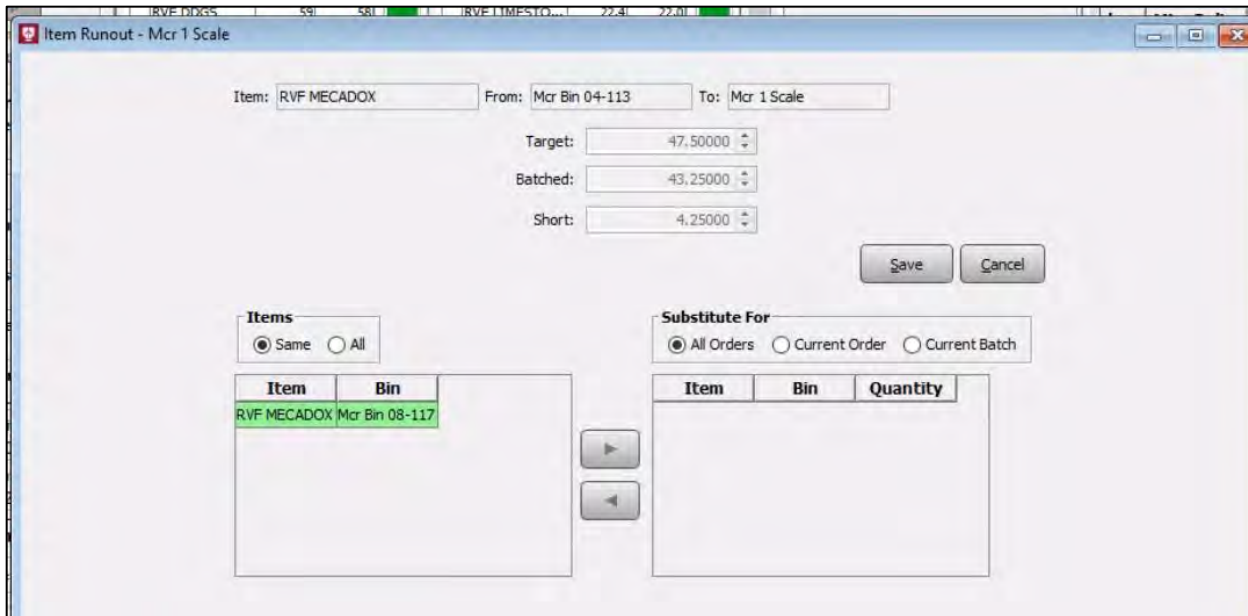

Selecting "Complete" will accept the current batched amount and move on.

Selecting "Retry" will bump the augers or try again if you refill the bin and are ready to resume.

Selecting "Substitute" will allow you to select a different origination bin for the ingredient or substitute a different ingredient.

Click "Substitute".

If you are substituting a different ingredient, you'll click the "All" button. Select your ingredient, then click the arrow to move it to the right. It will ask how much you want to substitute. Click OK.
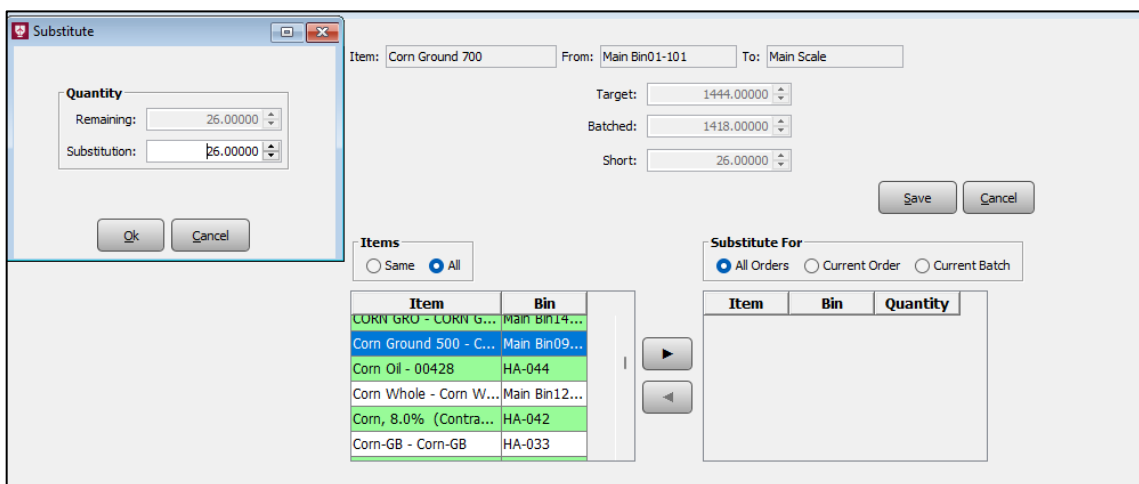
You also want to then select if you want it to substitute this for all orders going forward, just the current order, or just the current batch. Click "Save."

Over Tolerance

Double click on the event in the table.

Selecting "Complete" will accept the current batched amount and move on.

Selecting "Reweigh" will capture the scale weight again.

Selecting "Cancel" will close the window and the error will persist.

Negative Weight Fluctuation

Double click on the event in the table.

On the pop up, select "Retry" or "Cancel."

Selecting "Retry" will capture the scale weight again.

Selecting "Cancel" will close the window and the error will persist.

COMPLETING ORDERS

After the order has been manufactured in NGC, the details will automatically be sent back to NGO. Depending on your processes and settings, this order may automatically move to history, or you may need to do additional steps in NGO.

If any items are lot tracked, you will need to "Verify Lots." Highlight the order, then click "Verify Lots."

Check that the lot is correct and click "Save."

If the item was a bagged item, you will need to "Verify Yield." Highlight the order, then click "Verify Yield."

Update yield if needed then click "Save."

If a Loadout Process is required*, highlight the order needed to be loaded and press the "LOAD" button.

Fill out any details needed on the load page.

Click "Save." The order will then move to history.

*If you use Loadout in NexGen Controller or in NexGen Office Shipping and Receiving, the loadout process will be done in that program.