PAMS FRESH GENERATION

Assembly orders

September 10, 2026

Assembly orders

Overview

An assembly order records the work needed to assemble products for a project. Use it in
the project-management ordering flow after the related sales order and sales item are available, then continue with the resulting warehouse work.

If you need to…	Go to
Understand the order fields and item grid	Understand the Assembly Order screen
Open an existing order or start a new one	Find an assembly order
Enter products and save the order	Create and save an assembly order
Handle a new order, saved order, or optional path	Handle new, existing, and optional order states
Continue with receiving or inspection work	Warehouse fulfillment flow
Work with the project-management list context	Project management workspace

Prerequisites

Before you start, have the sales order and the sales item that the assembly order will serve. The order form requires **Inventory**, **Sales Order No.**, and **Sales Item Description**. The page also needs the assembly-order feature to be included in your subscription and the permission to create or edit the record.

The new-order route warns before navigation when unsaved changes exist. For an existing
order, **Save** and **Save and Close** appear only when the record is editable. The form marks
Inventory, **Sales Order No.**, **Sales Item Description**, **Ordered on**, **Completed on**,

and **Completed by** as required. It does not mark **Time Frame**, **Ordered by**, **Final product**, **Qty**, **Unit**, or **Name** as required.

Find an assembly order

An Assembly Orders list is where you locate saved assembly orders; the new-order surface is
where you begin a new one.

Prerequisites

- Know whether you are opening a saved order or creating a new one.
- Have the required access for the list or record.

Steps

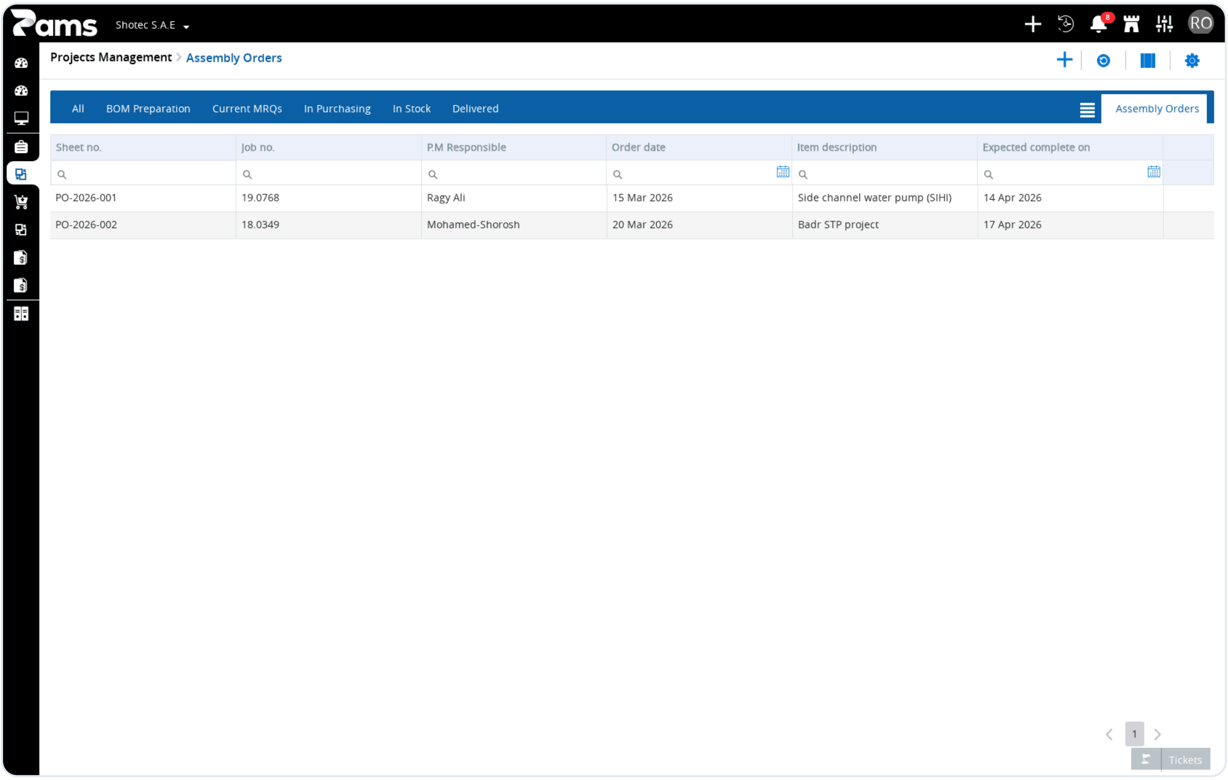
1. Open the route that matches your task.

If you need to…	Open
Locate a saved order	`/projects-management/production-order/view`
Create a new order	`/projects-management/production-order/new`
Open a saved order directly	`/projects-management/production-order/edit/<ID>`

2. On the list, identify an order from the headers **Sheet no.**, **Job no.**, **P.M Responsible**, **Order date**, **Item description**, and Expected complete on.
3. Select the order row to open the saved order's details surface.
4. To start a new order from the configured entry, select **Assembly Order**.

Result: You are on the saved order's details surface or on the new **Assembly Order** surface.

The **Assembly Orders** page appears under **Projects Management** and displays Assembly Order
records. The list also shows toolbar controls titled **Refresh**,
Table Layout, and **Settings**.



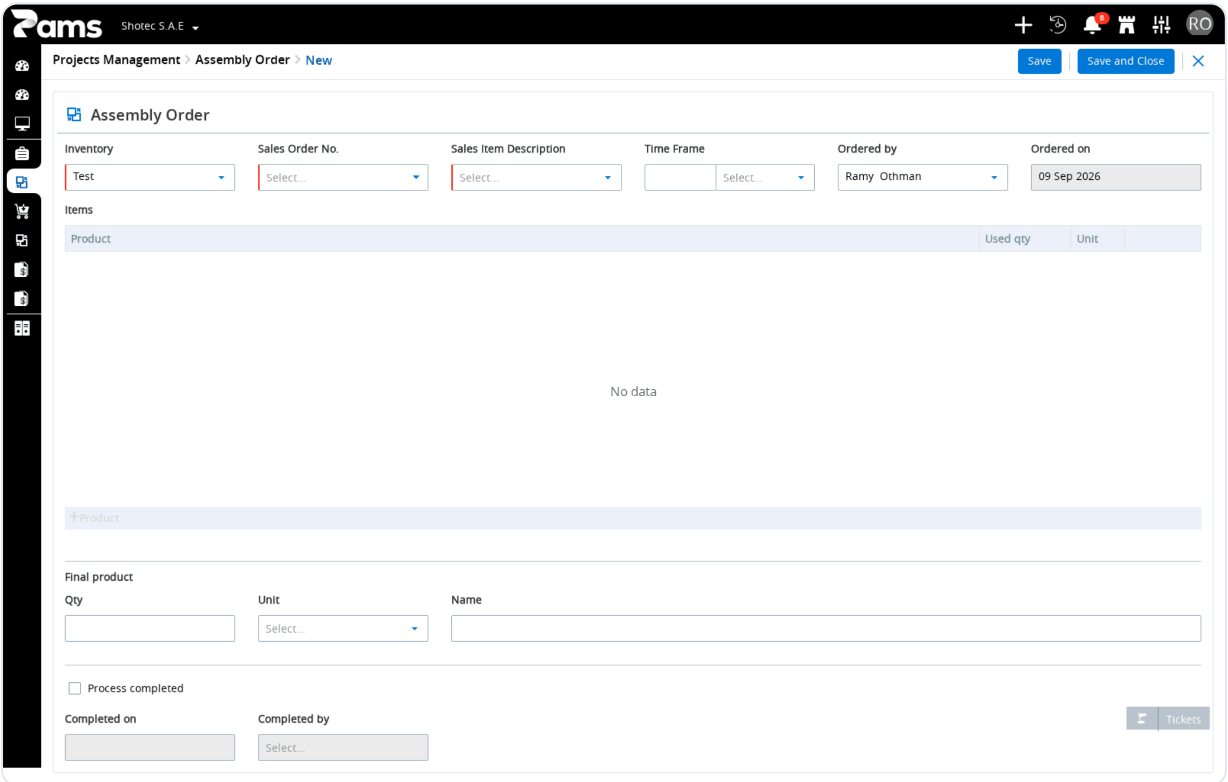
Understand the Assembly Order screen

The Assembly Order screen combines the order information, its product rows, and completion
information. The new-order surface contains the order fields, item grid, final-product fields,
completion controls, and save actions.

Area	What you can work with
Order information	**Inventory**, **Sales Order No.**, **Sales Item Description**, **Time Frame**, **Ordered by**, and **Ordered on**
Items	**Product**, Used qty, and **Unit**; Returned qty is added for an existing order
Final product	**Qty**, **Unit**, and **Name**
Completion	**Process completed**, **Completed on**, and **Completed by**
Save actions	**Save** and **Save and Close**

The new-order screen showed **Product**, Used qty, and **Unit** as the visible item-grid columns and showed `No data` before a product row was added. The **Unit** field in the **Final product** group is separate from the **Unit** column in the Items grid and the **Unit** text field in the product-edit popup.

The following surfaces are part of other work or do not appear from this order stage: the details tabs, **Finish and release to stock**, the separate **Final product** add action, and the row-delete action.



Create and save an assembly order

Create an assembly order when the related sales order and sales item are ready for assembly work.

Prerequisites

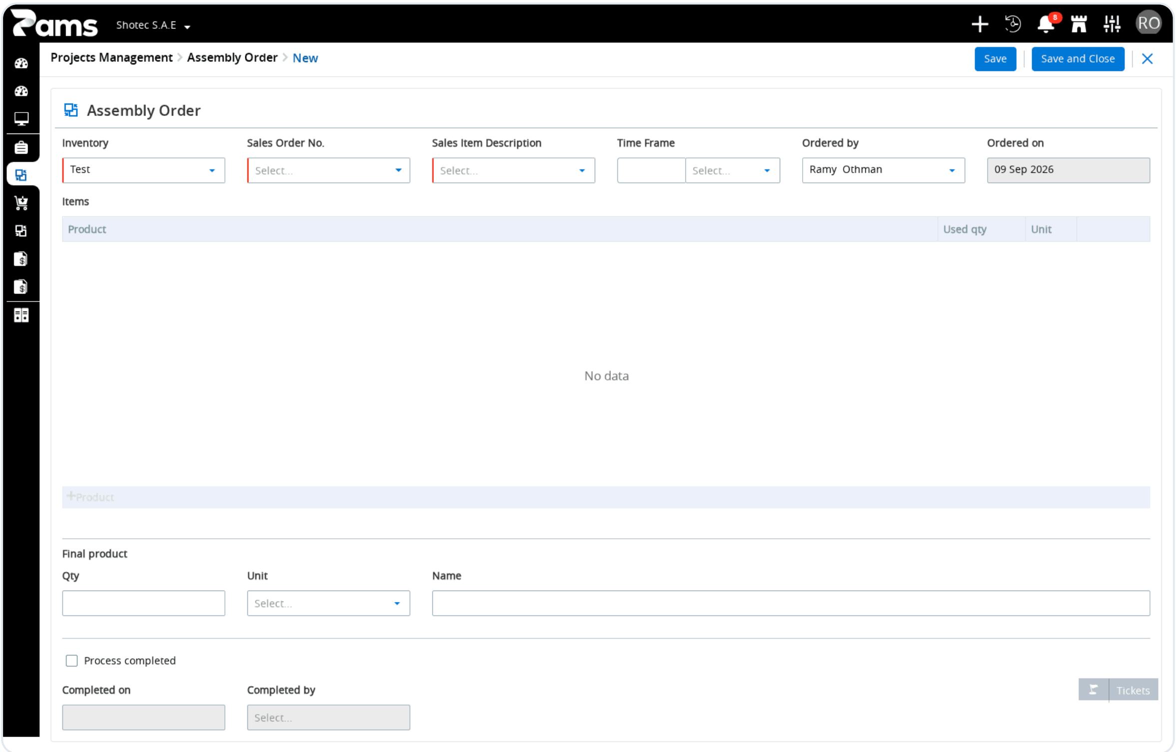
- Have the sales order and sales item to select.
- Have an inventory available to select.
- Know the order date and the project-management person responsible for the order.

Steps

1. Open `/projects-management/production-order/new`.
2. In **Inventory**, select the inventory for the order.

Select an inventory from **Inventory**.

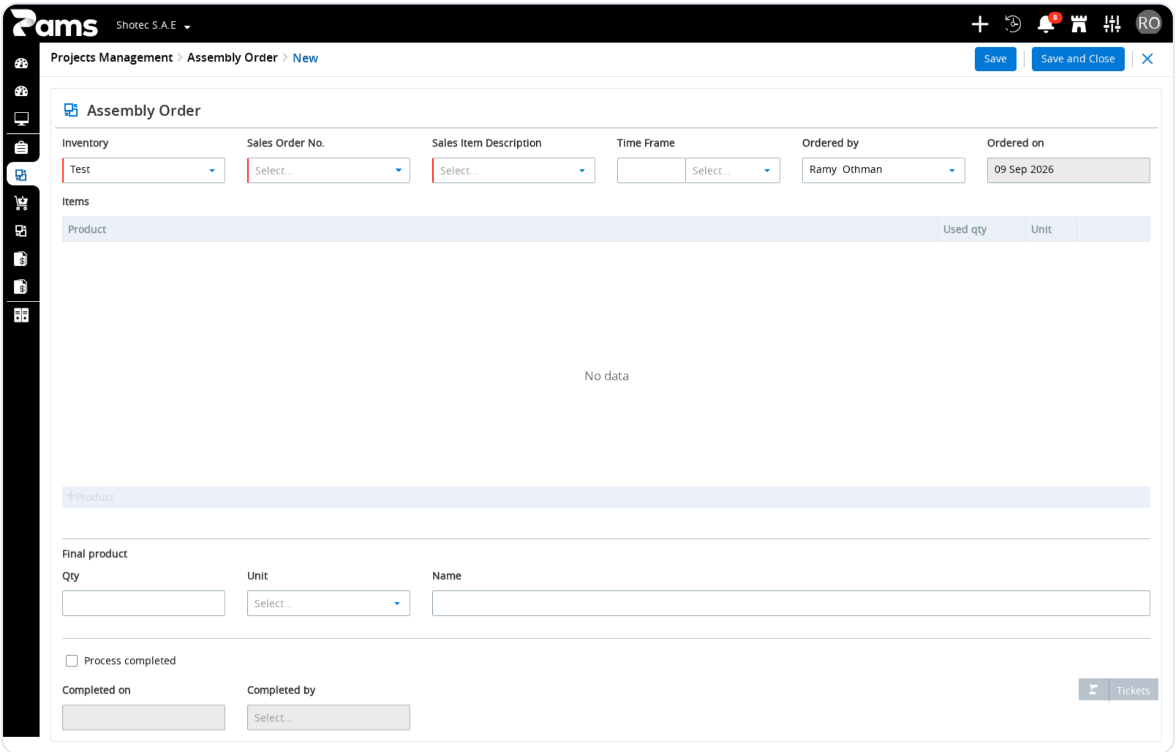
The captured screen shows **Inventory** as a visible field; it does not show any choice values.



3. In **Sales Order No.**, select the related sales order.

   Select the related sales order from **Sales Order No.**.

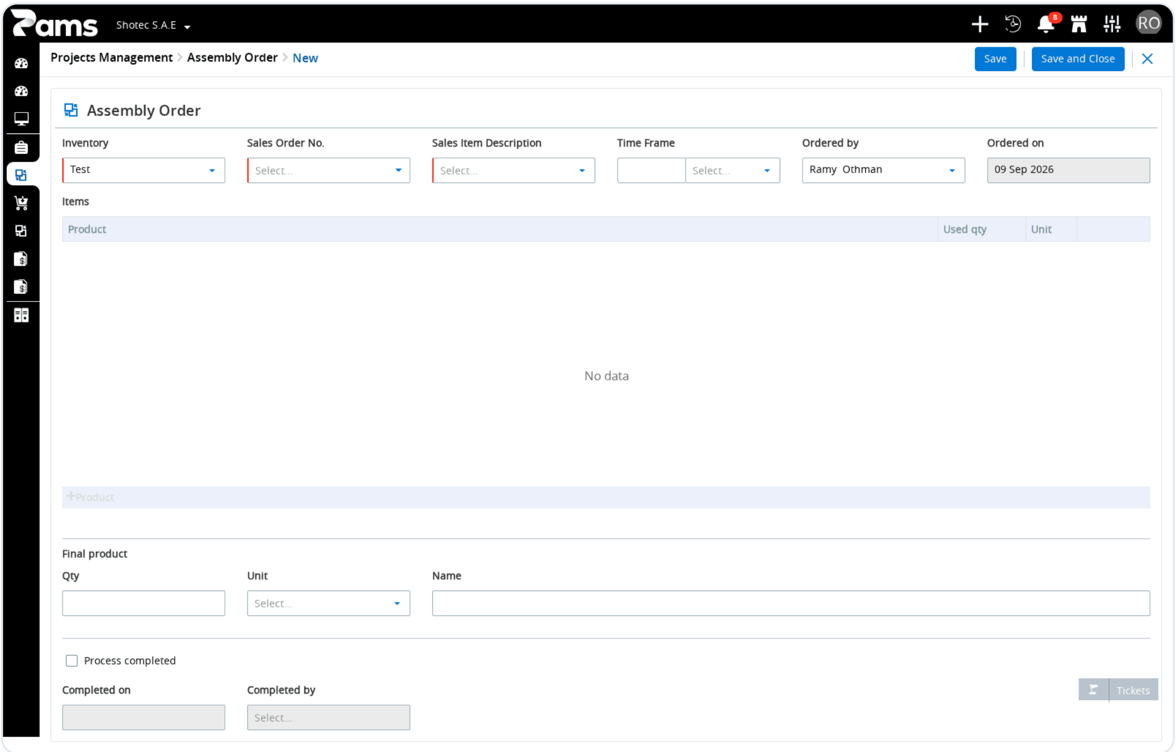
   The captured screen shows **Sales Order No.** as a visible field; it does not show any choice values.



4. In **Sales Item Description**, select the related sales item.
5. In **Ordered on**, review the date shown by the form.
6. In **Ordered by**, select the responsible project-management person when needed.
7. In **Time Frame**, enter the period value and select its period unit when needed.

   Select the period unit in **Time Frame** when you enter a period value.

   The captured screen shows **Time Frame** as a visible field; it does not show any period
   choice values.



8. Select **Product** under **Items** after **Sales Order No.** and **Sales Item Description** have values.
9. In the **Products** popup, select the products for the order.
10. Confirm the product selection with **OK**.
11. In the final-product section, enter **Qty**, select **Unit**, and enter **Name** when those details apply.
12. To record completion, select **Process completed**.
13. In **Completed on**, enter the completion date.
14. In **Completed by**, select the person who completed the work.
15. Select **Save**.
16. Select **Save and Close**.

Result: The order is saved with its product rows. The success message is `Your request was completed successfully`.

Handle new, existing, and optional order states

The controls available on an Assembly Order change with the record state and with feature access.

If…	Then…
The order is new and both **Sales Order No.** and **Sales Item Description** have values	**Product** is available for adding product rows.
The order already exists	**Inventory** and **Sales Order No.** are disabled, and Returned qty is added to the Items grid.
Process completed is selected	**Completed on** and **Completed by** become enabled and are required.
MRQ for stock is available	**MRQ for stock** appears in the add menu.

Prerequisites

- For a new order, select the sales order and sales item before adding a product.
- For completion details, select **Process completed** first.

Steps

1. Use the state in the first column of the table to follow the control named in the matching row.

Result: You use the controls available for the order's current state.

The details tabs, **Finish and release to stock**, the separate **Final product** add action, and the row-delete action are not available as active paths on this screen.

Resolve validation and access problems

When saving stops, use the exact message to choose the correction.

What you see	What to do
`Check mandatory field(s)`	Complete the required fields, including **Inventory**, **Sales Order No.**, **Sales Item Description**, **Ordered on**, **Completed on**, or **Completed by** when applicable.
`You cannot save without adding at least one product`	Add at least one product row under **Items**.
`Please enter the storage area and position for each product`	Enter the storage area and position for each product.

What you see	What to do
`Package products cannot be empty`	Add a product in the **Products** popup before confirming it.
`An error occurred while processing your request`	Review the entered data and try the save again.
`Shipment is empty. Please enter received quantity`	Continue on the receiving-sheet surface.
`Received quantity is greater than order quantity`	Continue on the receiving-sheet surface.
`You have products with no decision regarding accepted or rejected quantity`	Continue on the inspection-sheet surface.
`Just '_''´-''.' And '&' Characters Accepted`	Continue on the file-library surface.
`Amendment order deleted successfully`	Continue on the amendment-order surface.

Prerequisites

- An action has stopped and displayed a message.

Steps

1. Read the message shown after the action stops.
2. Follow the matching correction in the table.
3. Select the action that displayed the message again when the correction applies.

Result: You have corrected the reported problem or identified the related surface for the next action.

Know what comes next

After saving, continue with the related project-management or warehouse work.

After you…	Continue with…
Need the surrounding project-management work	Project management workspace
Need related receiving or inspection work	Warehouse fulfillment flow

Receiving sheet, inspection sheet, and transfer-history work are not carried by the active
order form. Use the related warehouse page for those tasks.

Result: You know which related page to use for the next warehouse task.