

PM

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PM — PM

Overview

PM provides a work area for reviewing Production Orders and organizing them by the operational queue that requires attention. Sales representatives, project managers, purchasing officers, warehouse managers, and finance users can use PM to locate job-related production work, review product and order details, and focus on planned or purchasing-related requirements.

The PM list displays Production Order information such as product description, quantity, sales number, PM responsible person, and Odoo order number. Use the available queues, search, and saved layouts to review the records relevant to your current responsibility.

Settings

Before reviewing Production Orders regularly, create a list layout that presents the columns needed by your role. A layout can be used to tailor the PM list for planning, purchasing follow-up, or general order review.

1. Open **PM** from the application navigation.
2. Decide whether to use the default list presentation or a saved layout.
 - Select **Standard Layout** to use the standard PM list presentation.
 - Select **Add Layout** to create a new layout.
3. When creating a layout, enter a clear value in **Layout name**. Use a name that identifies the review purpose, such as `Purchasing Follow-up` or `Planned BOM Review`.
4. Select **Columns Chooser** and choose the columns required for the review. The available PM list information includes product description, quantity, sales number, PM responsible person, and Odoo order number.
5. Select **Save** to retain the new layout.

Tip: Use a separate layout for each recurring review purpose. For example, a project manager may require sales and responsibility information, while a purchasing officer may prioritize product and quantity information.

6. When working with an existing saved layout, choose the appropriate outcome:
 - Select **Update Current** to retain changes to the layout currently in use.
 - Select **Cancel** to discard the current layout change.
 - Select **Delete Current** to remove the saved layout currently in use, where applicable.
 - Select **Delete** to remove a saved layout, where applicable.

Warning: Deleting a saved layout removes that layout from use. Select **Cancel** instead of a delete action if you only want to abandon unsaved changes.

Workflow

1. Sign in using your assigned credentials. Enter your user name and password, then select **Login** to access the application. Open **PM** from the application navigation.

2. Open the Production Orders work area by selecting **Assembly Order**.

Decide whether you need a complete overview or a focused operational queue:

- Select **All** to review all available Production Orders.
- Select **Planned (BOM)** to focus on orders planned from a bill of materials.
- Select **To Order (MRQ)** to focus on orders awaiting ordering activity.

The selected queue determines which Production Orders are displayed for review. Use **All** when you need to identify the current overall workload; use a focused queue when you are responsible for a particular planning or ordering activity.

3. If you need to review Production Orders by their current work stage, select the relevant PM queue in the Assembly Order work area.

Choose the queue that matches the required review:

- Select **All** for all Production Orders.
- Select **Planned (BOM)** for Production Orders planned from a bill of materials.
- Select **To Order (MRQ)** for Production Orders awaiting ordering activity.
- Select **In Purchasing** for Production Orders currently in purchasing.
- Select **In-house** for in-house Production Orders.
- Select **Delivered** for delivered Production Orders.

Each queue is a review view of Production Orders at the corresponding stage. The available controls identify the queue to review; no record transition action is provided on this screen.

Note: Queue selection changes the list you are reviewing. It does not itself confirm, purchase, deliver, or otherwise move a Production Order to another stage.

4. If you know the Production Order, product, sales number, responsible person, or Odoo order reference you need, enter suitable criteria in **Search**.

Review the matching rows and use the displayed columns to identify the correct Production Order. For example, compare the product description and quantity with the sales number, PM responsible person, and Odoo order number before taking follow-up action in the relevant business process.

5. Decide whether the current list presentation is sufficient for the review.

- If it is sufficient, continue reviewing the selected queue.

- If important information is not visible, create a layout with **Add Layout**, define the **Layout name**, select the required columns through **Columns Chooser**, and select **Save**.
 - If you are adjusting an existing layout, select **Update Current** to retain the changes or **Cancel** to discard them.
6. When the required Production Orders have been identified, complete the follow-up appropriate to the selected queue outside the list review. For example, use **Planned (BOM)** to review planned requirements before ordering work, or use **To Order (MRQ)** to identify orders that require ordering activity.

Examples

A purchasing officer needs to identify Production Orders awaiting ordering activity for a sales job.

1. The purchasing officer signs in with assigned credentials and opens **PM**.
2. The officer selects **Assembly Order** to open the Production Orders work area.
3. Because the objective is to review items awaiting ordering activity, the officer selects **To Order (MRQ)**.
4. The officer enters the relevant sales number in **Search**. If the sales number is not available, the officer searches using the product description instead.
5. The officer reviews the matching Production Order rows, checking the product description and quantity together with the sales number, PM responsible person, and Odoo order number.
6. The officer needs a clearer purchasing-oriented list and selects **Add Layout**. In **Layout name**, the officer enters `MRQ Purchasing Review`, selects **Columns Chooser**, chooses the required review columns, and selects **Save**.
7. The officer uses the saved layout while reviewing the **To Order (MRQ)** queue. The resulting list identifies the Production Orders that require ordering follow-up.

Tips

Tip: Start with **All** when investigating a sales job with an unknown current stage. Switch to a focused queue only after you have identified whether the order is planned, awaiting ordering activity, in purchasing, in-house, or delivered.

Tip: Use **Search** before changing layouts when you only need to find one Production Order. Create or update a layout when the same column arrangement will be used repeatedly.

Warning: Select **Update Current** only when you intend to change the saved layout currently in use. Use **Cancel** when testing a different column selection that should not be retained.

Troubleshooting

Symptom	Likely cause	Fix
The required Production Order is not visible.	The current queue is too narrow for the order's current work stage.	Select All to review all available Production Orders, then use Search to narrow the results.
Search does not return the expected record.	The entered search criteria do not match the displayed Production Order information.	Check the product description, sales number, PM responsible person, or Odoo order number and search again using the available reference.
Required information is not displayed in the list.	The current layout does not include the columns needed for the review.	Select Columns Chooser , adjust the columns, and select Update Current ; alternatively, create a new layout with Add Layout and Save .
A layout change should not be retained.	The layout is still being edited.	Select Cancel before saving or updating the current layout.

Related pages

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- [PM — Learning Path](#)