



CUSTOMER GUIDE

JSBS Core

The Complete Customer Guide

Engineering, manufacturing, planning, inventory, warehouse, and commercial workflows

JSBS Core 1.6.0

Prepared by JS Business & Services, DBA JSBS Co.

ABOUT THIS GUIDE

Welcome to JSBS Core

JSBS Core is a connected Windows workspace for engineering, manufacturing, planning, inventory, warehouse, and commercial work. This guide explains what each module is for, how to complete its core workflow, and how records connect so customers can teach the process consistently.

FICTIONAL TRAINING DATA Every person, company, Project, CAD number, date, amount, and work item in the screenshots was created solely for documentation. It does not represent a customer, facility, product, or prior employer.

About the product

JSBS Core is a product of JS Business & Services, doing business as JSBS Co. It keeps related work connected without forcing a small team to adopt every possible process on day one.

How to use this guide

- Read Getting Started once, then use module chapters as working reference.
- Follow numbered procedures from the top when completing a workflow for the first time.
- Use Connected work to understand what a change affects outside the current screen.
- Use Troubleshooting before changing data just to make a warning or count disappear.
- Remember that visible modules and actions depend on administrator-assigned permissions.

NAVIGATION

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GETTING STARTED

Workspace map

The left navigation is organized by business purpose. The exact list for a user is controlled by module view permission.

Core records	Dashboard, Projects, CAD Tracker, ECO, Tasks, BOMs, Standards, Inventory, and Warehouse.
Manufacturing	Manufacturing Notes and Work Orders.
Planning	Work Planning and Materials Planning.
Commercial	RFQs, Quotes, Sales Orders, Purchase Orders, Invoices, Packing Slips, and Vendors & Customers.
Find and communicate	Search and Reports.
System	Settings and Data & Backups.

CONNECTION STATUS The lower-left indicator confirms whether JSBS Core is using an embedded Solo database or a Team server connection. Investigate a disconnected or compatibility-warning state before entering important work.

GETTING STARTED

First-session checklist

1. **Confirm your identity.** Check the name and role at the upper left. Ask an administrator to correct the workspace user if it is wrong.
2. **Check the connection.** Look for the green connected indicator and expected Solo or Team connection type.
3. **Open Dashboard.** Scan open work, due dates, Project progress, and unassigned items.
4. **Open Notifications.** Use Inbox to review permitted assignments and due-date alerts. Select Personal settings to change and save your own alert preferences. Inbox refresh and read/dismiss actions preserve unsaved settings.
5. **Confirm access.** Open the modules you use. Missing modules or read-only commands usually reflect user permissions.
6. **Know the backup owner.** Identify who protects the Solo or Team database and coordinates updates.

LIGHT AND DARK THEMES Screenshots use the light theme because it prints cleanly. Dark theme keeps the same layout and workflow; colors and contrast adapt to the personal setting.

GETTING STARTED

Permissions and user accounts

JSBS Core uses the approved Windows identity to select the workspace user. Administrators maintain the display name, active state, administrator state, and module rights. Device licensing and workspace-user permission are related responsibilities, but they are not the same setting.

Module off	The module is hidden for the user.
View on / Write off	The user can review records but cannot create, edit, assign, post, or otherwise change them.
View on / Write on	The user can use the module's change actions, subject to record state and workflow rules.
Administrator	Can manage shared configuration and users. Protect this authority.
Stale-write protection	If another user saves first, the older edit cannot silently overwrite the newer record.

PRACTICAL TEST After changing permissions, sign in as the affected user when possible and test the real task—not only whether the navigation button appears.

GETTING STARTED

Record conventions

Number	A stable human-facing identifier such as a CAD, ECO, Task, Standard, order, or BOM number.
Status	The record's workflow state. Administrators may configure choices in supported areas.
Priority	Relative urgency; it does not replace the due date or business decision.
Due/action date	Drives workload, overdue, and due-soon visibility while the record is open.
Project link	A real relationship to a Project identity, not merely a typed name.
Effective assignment	The people who own the record after inherited or custom-team rules are applied.
Attachment	Supporting evidence; storage differs by record type and is explained in its chapter.

Select a row to enable its named actions. Open or View details shows the record; Edit opens the form. Projects use Open project workspace for connected work and Edit project for the Project form. The Refresh button is in the top bar; F5 does the same job.

GETTING STARTED

Navigation and shared updates

On/off options use toggle switches. Checkboxes remain for row selection, batch-field selection and acknowledgements. Their purpose is unchanged.

Use the small arrow at the top-right of the sidebar to collapse it to icons and gain working space. Hover over an icon for its module name. Your active module, permissions, notification bell, and saved navigation preference remain available.

Open a module	Click its navigation tab to reload current records. Back and Forward help you return through connected work.
Refresh now	Use the outlined Refresh button at the top or F5. Filters, selection and unfinished operational input are retained where applicable.
BOMs and Inventory	Visible registers refresh about every 30 seconds. Open edit forms keep their drafts; they do not merge another user's edits automatically.
Notifications	The shell checks about every five minutes. Open the bell and use Inbox > Refresh for a current check. Unread only is a toggle; the blue indicator means unread alerts.
Team connection	The status is checked about every 15 seconds. Amber feedback means the server is unavailable; reconnecting allows subsequent reads to recover without restarting Core.
Permissions changed	Close and reopen Core after an administrator changes your workspace access.

SHARED DATA IS REFRESHED Updates use periodic checks and module refresh, not instant live editing. If a save reports a conflict, compare the latest record with your retained draft. If the connection fails during posting, check the record and movement history before trying again; the original action may have completed.

GETTING STARTED

Connected records and safe editing

The value of JSBS Core comes from stable relationships. Link the real record instead of copying its visible number into free text. This preserves traceability when a title, name, or revision changes.

- Do not rebuild relationships by matching visible names or numbers; select the source record.
- Do not delete an Inventory, CAD, or vendor record merely to remove one BOM line.
- Do not edit a posted Warehouse movement; reverse it or post a correcting event.
- Do not overwrite a stale-write warning; reload, compare, and reapply only intentional changes.
- Do not treat a Manufacturing Note flag as approval for an engineering change.
- Do not assume a saved PDF remains current after the source record changes.

SAFE DEFAULT When a record has history or downstream links, prefer deactivate, retire, close, reverse, or void according to the module instead of deleting evidence.

MODULE GUIDE

1. Dashboard

Use the workspace-wide Overview or filter User workload to any active user so open, overdue, due-soon, and unassigned work is visible before it becomes a surprise.

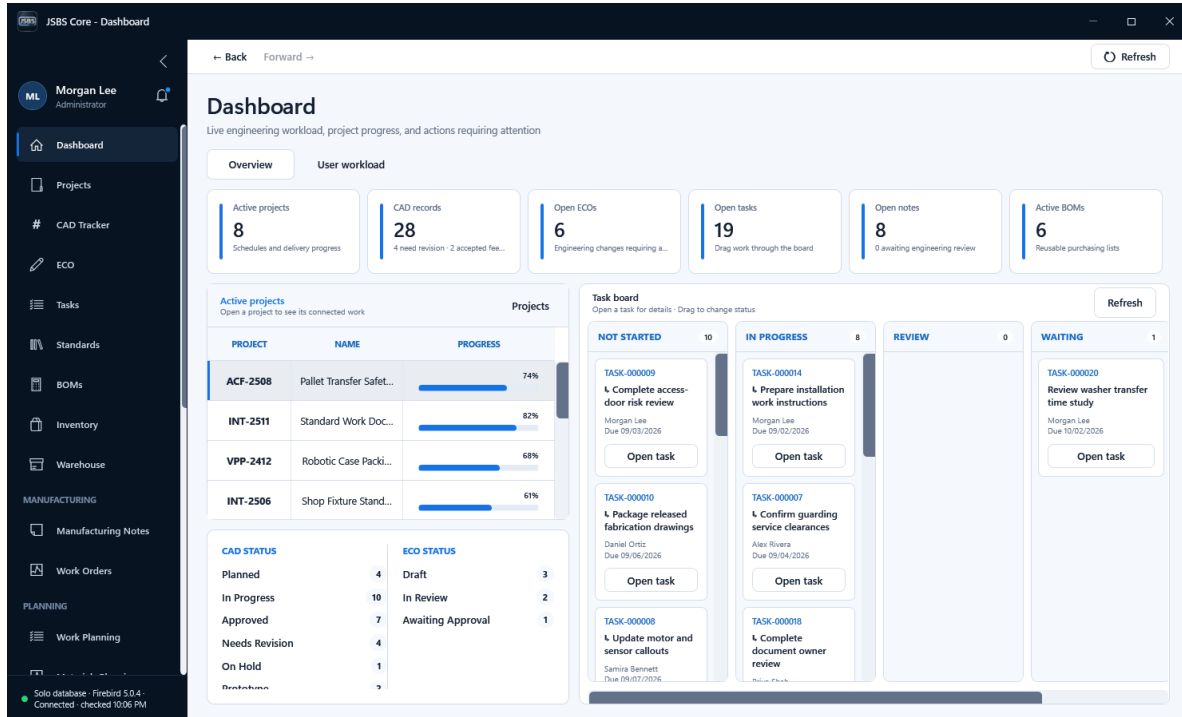


Figure 1.1. Dashboard Overview with fictional Project, engineering, Task, manufacturing, and BOM totals.

What to know before you start

- Overview summarizes only modules the signed-in user can read.
- User workload can be filtered to any active workspace user; it is not locked to the current user.
- The notification bell surfaces new assignments and due-date alerts for the signed-in user.
- Project progress uses released ECOs and completed active leaf Tasks; parent Task containers do not double-count sub-task work.

DASHBOARD

1.1 Complete the core workflow

1. **Scan the summary cards.** Look for open ECOs, CAD needing revision, open Tasks, and Manufacturing Notes needing attention.
2. **Review Project progress.** Compare progress and delivery dates, then open a Project when the summary suggests risk.
3. **Open User workload.** Choose a user or turn on Unassigned only to focus the list.
4. **Open Notifications.** Review unread assignments and due-date alerts, then open the related item.
5. **Update the source record.** Change status, due date, assignment, or connected work in its owning module.

PERMISSION Dashboard read access controls whether the module appears. Work Planning write access is required to change teams from workload views.

The screenshot shows the JSBS Core Dashboard interface. The sidebar on the left contains navigation links for Dashboard, Projects, CAD Tracker, ECO, Tasks, BOMs, Standards, Inventory, Warehouse, Manufacturing (Manufacturing Notes, Work Orders), and Planning (Work Planning, Materials Planning). The main content area is titled 'Dashboard' and 'User workload'. It features summary cards for Open Items (41), Unassigned (0), Overdue (0), and Due in 7 Days (7). Below these cards is a table of work items with columns: TYPE, NUMBER, TITLE, STATUS, PRIORITY, ASSIGNED TO, SOURCE, ACTION DATE, and PROJECTS. The table lists several tasks and one ECO with their respective statuses and priorities.

TYPE	NUMBER	TITLE	STATUS	PRIORITY	ASSIGNED TO	SOURCE	ACTION DATE	PROJECTS
Task	TASK-000014	Prepare I...	In Progress	Critical	Alex Rivera, Priya Shah	Uses project team	Sep 2, 2026	ACF-2508
Task	TASK-000009	Comple...	Not Started	High	Daniel Ortiz, Samira Bennett	Uses project team	Sep 3, 2026	VPP-2412
Task	TASK-000007	Confirm...	In Progress	High	Alex Rivera, Morgan Lee	Uses project team	Sep 4, 2026	ACF-2407
Task	TASK-000004	Coordin...	In Progress	Critical	Alex Rivera, Priya Shah	Uses project team	Sep 5, 2026	ACF-2508
Task	TASK-000018	Comple...	In Progress	Medium	Daniel Ortiz, Samira Bennett	Uses project team	Sep 5, 2026	INT-2511
ECO	ECO-000005	Pallet st...	Draft	Critical	Alex Rivera, Priya Shah	Uses project team	Sep 6, 2026	ACF-2508

Figure 1.2. A closer view of the Dashboard workflow.

DASHBOARD

1.2 Connected work and record behavior

Projects	Active Project progress and effective Project-team assignments feed both Dashboard views.
ECOs, Tasks, Manufacturing Notes	Open linked work appears with status, priority, due date, and effective assignees.
Work Planning	Provides the assignment editor and history when a team needs to change.
Notifications	Creates a personal action inbox; changing an alert never changes the underlying work item.

Key fields and states

Open items	Open Projects, ECOs, Tasks, and Manufacturing Notes in the current view.
Unassigned	Open work without an effective Project or custom team.
Overdue	Open work whose action or due date is in the past.
Due soon	Open work inside the signed-in user's personal notification window.

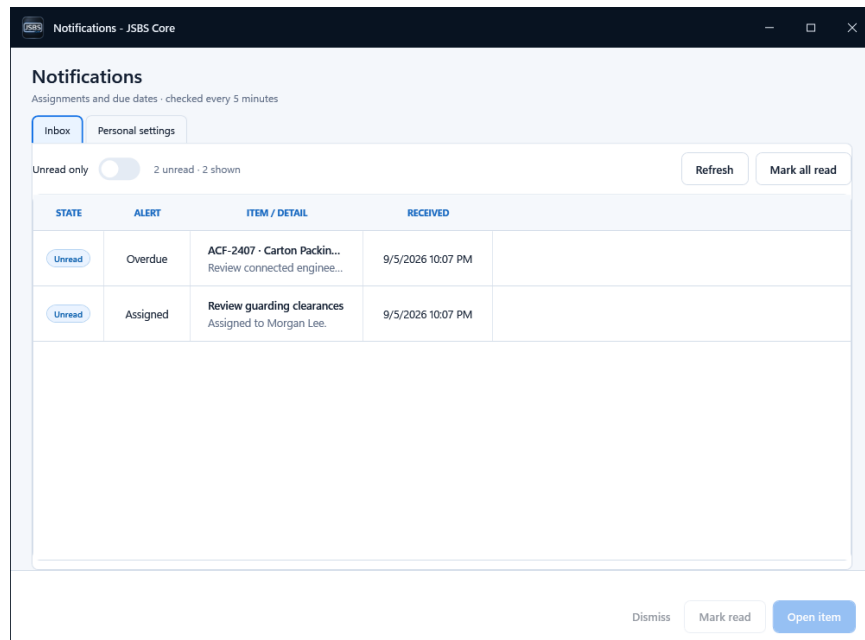


Figure 1.3. Connected details within Dashboard.

DASHBOARD

1.3 Practical reference

Recommended habits

- Start each day with Notifications, then filter User workload to your name.
- Managers should review Unassigned only before balancing named users.
- Use meaningful due dates so time-sensitive work can appear as due soon or overdue.

Troubleshooting

Counts differ between users	Compare module permissions and filters; Dashboard is permission-aware.
Work is missing	Confirm the record is open and assigned directly or through a linked Project team.
Bell has no blue dot	There may be no unread alert, or that alert type may be disabled in personal settings.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

2. Projects

Create the shared container that ties schedules, people, CAD, ECOs, Tasks, Manufacturing Notes, Work Orders, and commercial context into one traceable body of work.

The screenshot displays the JSBS Core - Projects interface. On the left is a sidebar with navigation links: Dashboard, Projects (selected), CAD Tracker, ECO, Tasks, Standards, BOMs, Inventory, Warehouse, Manufacturing Notes, Work Orders, and Work Planning. The main area shows a 'Projects' register with a table of 8 projects. The table columns are CODE, NAME, CUSTOMER, STATUS, and STAGE. The first project, ACF-2407, is highlighted. To the right of the table is a 'PROJECT DETAILS' panel for ACF-2407, showing its name, customer, status (Active), stage (Design), and a progress bar. Below the progress bar are fields for DUE date (10/11/2026), MANAGER (Morgan Lee), and a description of the project: 'Improve carton handling, guarding, and changeover access around the primary packing cell.' A 'LINKED CAD' section lists three items: A000003 Servo mounting plate, A000001 Base frame weldment, and B000003 Carton pusher arm assembly. At the bottom of the interface, a status bar indicates 'Solo database - Firebird 5.0.4 - Connected - checked 10:06 PM'.

CODE	NAME	CUSTOMER	STATUS	STAGE
ACF-2407	Carton Packing Cell Upgrade	Alder Creek Foods	Active	Design
ACF-2508	Pallet Transfer Safety Retrofit	Alder Creek Foods	Active	Production
HHP-2503	Leak Test Station Modernization	Harborstone Home Pro...	Active	Design
HHP-2514	Parts Washer Throughput Improvement	Harborstone Home Pro...	On Hold	Planning
INT-2506	Shop Fixture Standardization		Active	Production
INT-2511	Standard Work Documentation Refresh		Active	Review
VPP-2412	Robotic Case Packing Line	VelaPoint Packaging	Active	Review
VPP-2510	Conveyor Controls Refresh	VelaPoint Packaging	Active	Planning

Figure 2.1. Projects register showing realistic fictional programs, progress, status, dates, and teams.

What to know before you start

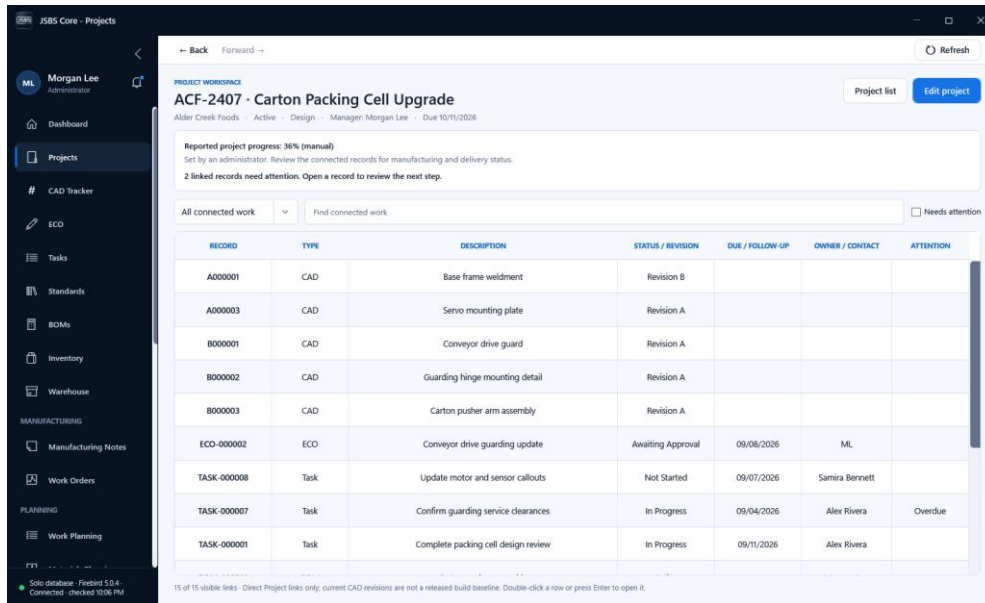
- A Project can be unassigned, assigned to one person, or assigned to several people.
- Linked work normally inherits the combined teams of every linked Project.
- Small Projects can stay simple; larger Projects can link many records and a multi-person team.
- Automatic progress reflects completed active leaf Tasks and released ECOs connected to the Project. Manufacturing, shipment and billing have separate statuses; this percentage is not overall delivery completion.
- Connected work shows only modules you can view. Current CAD revisions are shown for reference and do not establish a released manufacturing baseline.

PROJECTS

2.1 Complete the core workflow

1. **Create the Project.** Enter a recognizable code and name, then set status, priority, dates, customer context, and description.
2. **Assign the team when useful.** Choose one or more active users, or leave the Project unassigned until ownership is known.
3. **Link engineering work.** Add CAD, ECOs, Tasks, Manufacturing Notes, and Work Orders from their owning modules.
4. **Choose the next action.** Highlight one Project to reveal Edit project and Open project workspace beside New project at the top. The same actions remain in the details pane. Edit opens the form; the workspace shows connected work. Double-clicking a Project also opens its workspace.
5. **Explore connected work.** The workspace shows directly linked engineering, manufacturing and commercial records. Filter by work area, search, or Needs attention; open a record and use Back to return to the same view.
6. **Maintain status and dates.** Keep delivery date and status current so planning and Dashboard views stay useful.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.



PROJECT WORKSPACE
ACF-2407 · Carton Packing Cell Upgrade
Alder Creek Foods · Active · Design · Manager: Morgan Lee · Due 10/11/2026

Reported project progress: 36% (manual)
Set by an administrator. Review the connected records for manufacturing and delivery status.
2 linked records need attention. Open a record to review the next step.

All connected work: ☐ Needs attention

RECORD	TYPE	DESCRIPTION	STATUS / REVISION	DUE / FOLLOW-UP	OWNER / CONTACT	ATTENTION
A000001	CAD	Base frame weldment	Revision B			
A000003	CAD	Servo mounting plate	Revision A			
B000001	CAD	Conveyor drive guard	Revision A			
B000002	CAD	Guarding hinge mounting detail	Revision A			
B000003	CAD	Carton pusher arm assembly	Revision A			
ECO-000002	ECO	Conveyor drive guarding update	Awaiting Approval	09/08/2026	ML	
TASK-000008	Task	Update motor and sensor callouts	Not Started	09/07/2026	Samira Bennett	
TASK-000007	Task	Confirm guarding service clearances	In Progress	09/04/2026	Alex Rivera	Overdue
TASK-000001	Task	Complete packing cell design review	In Progress	09/11/2026	Alex Rivera	

15 of 15 visible links · Direct Project links only; current CAD revisions are not a released build baseline. Double-click a row or press Enter to open it.

Figure 2.2. A closer view of the Projects workflow.

PROJECTS

2.2 Connected work and record behavior

CAD Tracker	A CAD record may belong to one or more Projects and retains stable links by identity.
ECOs and Tasks	Released ECOs and completed active leaf Tasks contribute to calculated progress.
Manufacturing Notes	Manufacturing feedback can be connected to a Project and, when approved, to an ECO.
Work Planning	Project teams become the default effective team for linked work.
Commercial documents	Project references keep quotation, order, and purchasing activity connected to delivery work.

Key fields and states

Status	Use an active status while work is underway and a completed/closed status only when no action remains.
Priority	Supports workload sorting and makes urgent work easier to identify.
Team	May contain multiple users or remain unassigned.
Progress	Automatic engineering/task progress uses released ECOs and completed leaf Tasks. Manual mode shows a percentage reported by a Project editor.

PROJECTS

2.3 Practical reference

Recommended habits

- Use human-readable Project codes that remain stable even if the display name changes.
- Link work to Projects instead of repeating Project names in free text.
- Do not assign every linked item separately unless it genuinely needs a custom team.

Troubleshooting

Progress looks low	Check that completed Tasks are active leaf Tasks and ECOs have reached Released.
Unexpected assignees	Review every linked Project team and whether the child uses inherited or custom assignments.
Project cannot be found	Clear filters, include closed Projects when needed, and confirm read permission.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

PROJECTS

Project time and cost

Open a Project workspace and choose Time & cost to review engineering, prototyping and production costs together. The entries and Budget & forecast tabs use the same table controls as the rest of Core.

1. **Log engineering time.** Choose Log time. Enter the person, date, category, hours and hourly cost rate. Use it for CAD, design review, prototype development, testing or coordination. A blank rate means unknown; the hours still count.
2. **Record incurred costs.** Choose Add expense for prototype material, tooling, outside machining, testing or freight. Expenses do not move warehouse stock.
3. **Track outstanding obligations.** Choose Add commitment for costs still expected. Select it and choose Record as expense when incurred; this converts the same entry rather than counting it twice.
4. **Include production actuals.** Linked Work Order setup and run hours appear automatically as Production time. Select an operation and choose Set production rate for its combined hourly labor and machine cost. Correct hours on the Work Order itself.
5. **Review and correct.** Select one entry to edit it, review its history or void an error. Voiding removes it from active totals and preserves history. Production hours cannot be edited or voided here.

Keep the cost history meaningful

Each time entry and production operation retains its own rate. Changing a budget suggestion does not recalculate old entries. Optional source links connect costs to related Project work; permissions on those sources can limit visibility. Search and category filters affect the table, while totals include all accessible active entries.

PROJECTS

Budgets forecasts and costing access

Use Budget & forecast to compare the planned cost with recorded actuals and your estimate of the work remaining. Unknown values remain visible rather than becoming zero.

Budget categories	Choose Set budget & forecast to edit a category, or Add budget category to create one. Suggestions include Engineering, Prototyping & testing, Manufacturing, Project coordination and Other. Custom categories are allowed.
Actual cost	Hours multiplied by their retained rate, plus incurred expenses. Actual (known) and the uncosted-entry count identify missing rates.
Cost to finish	Enter all expected remaining costs, including outstanding commitments. Blank means unknown; zero means nothing remains. Enter estimated hours and hours to finish separately.
Forecast	Actual cost plus Cost to finish. Missing rates or forecasts, or cost to finish below outstanding commitments, make the forecast incomplete.
Example in USD	3.5 hours at 100 per hour plus a 625 expense gives 975 actual cost. With 2,000 cost to finish, the forecast is 2,975. A 1,200 commitment included in cost to finish is not added again.
Currencies and scope	Currencies remain separate with no conversion. Material consumption, purchasing and sales are not automatically posted as expenses. Record those deliberately. Costing is internal planning, not billing or accounting; weekly capacity scheduling is not included.

Give costing access separately

In Users & permissions, find Project costing. View off hides costing while leaving ordinary Project work available. View on and Write off permits review; Write on permits cost and budget changes. Non-administrators also need Projects access and receive no costing access automatically. Administrators retain access. Reopen Core after permission changes.

MODULE GUIDE

3. CAD Tracker

Maintain the controlled register of drawings, models, assemblies, revisions, release state, Projects, ECOs, BOM use, and prominent manufacturing-feedback indicators.

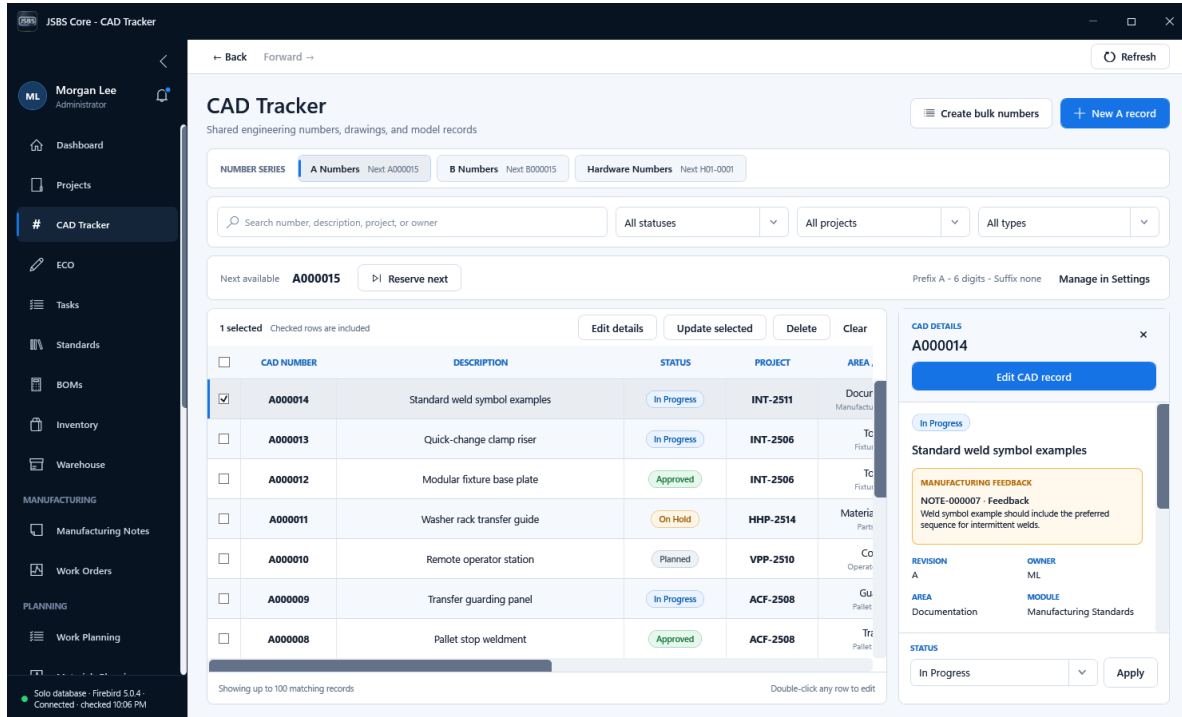


Figure 3.1. CAD Tracker register with fictional CAD numbers, descriptions, revisions, owners, and release states.

What to know before you start

- CAD records are the stable engineering identity; revision changes occur on the same record.
- Manufacturing feedback can be flagged prominently without automatically authorizing an engineering change.
- A released ECO can advance the controlled revision when the ECO workflow is used.
- BOM lines pin the CAD revision selected so later CAD updates do not silently rewrite purchasing context.

CAD TRACKER

3.1 Complete the core workflow

1. **Create or open a CAD record.** Enter number, description, revision, type, status, owner, and notes.
2. **Link Projects.** Connect the record to one or more Projects instead of relying on text-only references.
3. **Link or review ECOs.** Show which approved change controls a revision.
4. **Review manufacturing feedback.** Use the prominent feedback area to see open Notes and engineering disposition.
5. **Release or revise deliberately.** Follow the controlled process; do not edit a revision just to clear a warning.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

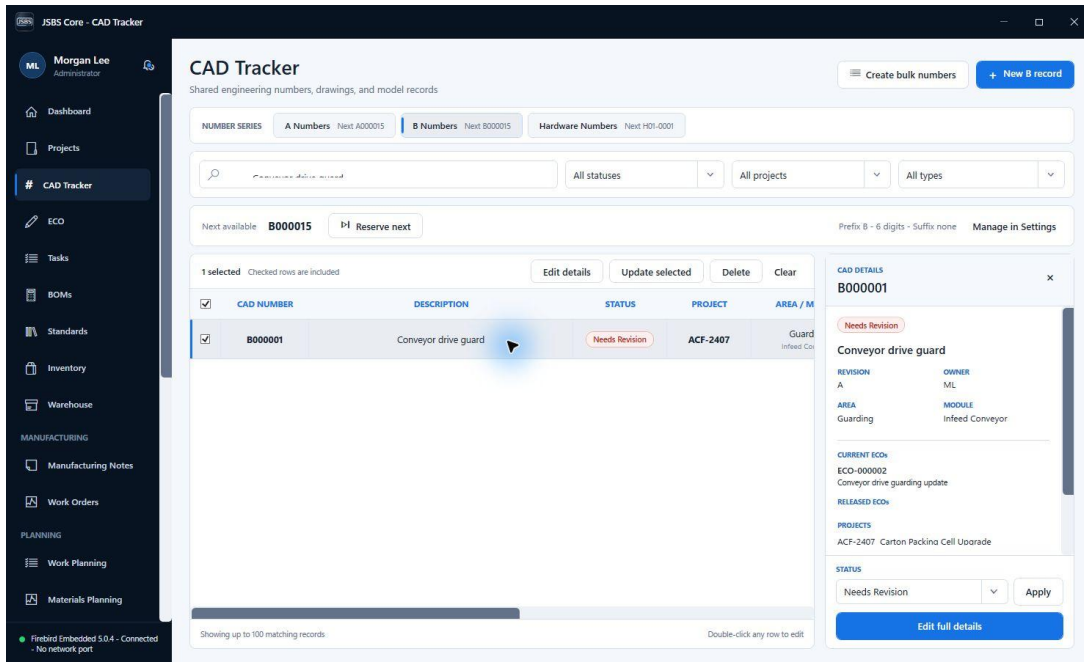


Figure 3.2. A closer view of the CAD Tracker workflow.

CAD TRACKER

3.2 Connected work and record behavior

Projects	A CAD record may support several Projects while remaining one controlled record.
ECO	Provides review, approval, release, and revision-change traceability.
Manufacturing Notes	Can flag the record, request review, or be resolved without a design change.
BOMs	BOM lines reference both the CAD identity and a pinned revision.
Search and Reports	Number, description, Project, and linked records support retrieval and reporting.

Key fields and states

Needs revision	A prominent attention state, not proof that a change is approved.
Open manufacturing feedback	Signals unresolved Notes associated with the CAD record.
Revision	The controlled revision value on the CAD record.
Released state	Whether the record is controlled for downstream use according to configured choices.

CAD TRACKER

3.3 Practical reference

Recommended habits

- Treat the CAD number as stable identity and revision as controlled state.
- Read the Manufacturing Note disposition before assuming the design must change.
- Use a linked ECO instead of explaining a revision change only in Notes.

Troubleshooting

CAD remains flagged	Confirm every relevant Note has disposition and any required ECO is released or the Note otherwise resolved.
Wrong BOM revision	Open the BOM line and intentionally repin it; CAD updates do not rewrite BOMs automatically.
Cannot edit	Check CAD write permission and whether another user saved a newer record.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

4. Engineering Change Orders

Propose, review, release, and close controlled changes while preserving reason, affected CAD hierarchy, Projects, assignments, release details, and resulting revision trail.

The screenshot displays the 'Engineering Change Orders' interface in JSBS Core. The left sidebar contains navigation links for Dashboard, Projects, CAD Tracker, ECO, Tasks, Standards, BOMs, Inventory, Warehouse, Manufacturing Notes, Work Orders, and Work Planning. The main content area is titled 'Engineering Change Orders' and includes a search bar and filters for statuses, priorities, and types. Below this is a summary bar showing counts for Open ECOs (6), Awaiting approval (1), Critical (1), and Due this week (2). The 'Change register' table lists six ECOs with their titles, statuses, priorities, types, and the number of CAD records they link. The right-hand panel provides details for the selected ECO-000006, showing its status as 'Draft', priority as 'Low', owner as 'PS', and a list of three linked CAD records: A000012 Modular fixture base plate, B000012 Adjustable locator block, and A000013 Quick-change clamp riser.

ECO	TITLE	STATUS	PRIORITY	TYPE	CAD RECORDS
ECO-000006	Standardize fastener callouts	Draft	Low	Process Change	3
ECO-000005	Pallet stop sensor relocation	Draft	Critical	Process Change	1
ECO-000004	Control enclosure ventilation change	In Review	Medium	Design Change	2
ECO-000003	Leak manifold port correction	Draft	Medium	Correction	1
ECO-000002	Conveyor drive guarding update	Awaiting Approval	High	Correction	3
ECO-000001	Access door interlock mounting revision	In Review	High	Design Change	1

Figure 4.1. Engineering Change Order register showing fictional changes, status, priority, due dates, and assignees.

What to know before you start

- An ECO can link multiple CAD records and Projects.
- Draft and review work can be assigned to several users through Work Planning.
- Release is the controlled milestone that can satisfy an approved Manufacturing Note change.
- Closing a source Manufacturing Note from ECO release is optional and controlled by an administrator setting.

ENGINEERING CHANGE ORDERS

4.1 Complete the core workflow

1. **Create the ECO.** Describe the change, reason, priority, requested date, and initial status.
2. **Link affected CAD.** Select records in scope and define intended revision movement where applicable.
3. **Link Projects and source records.** Connect the ECO to Projects and any Manufacturing Note that initiated review.
4. **Complete review and release details.** Record approval and release information required by the organization.
5. **Release, then verify downstream state.** Confirm CAD revisions and configured Note closure occurred as intended.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

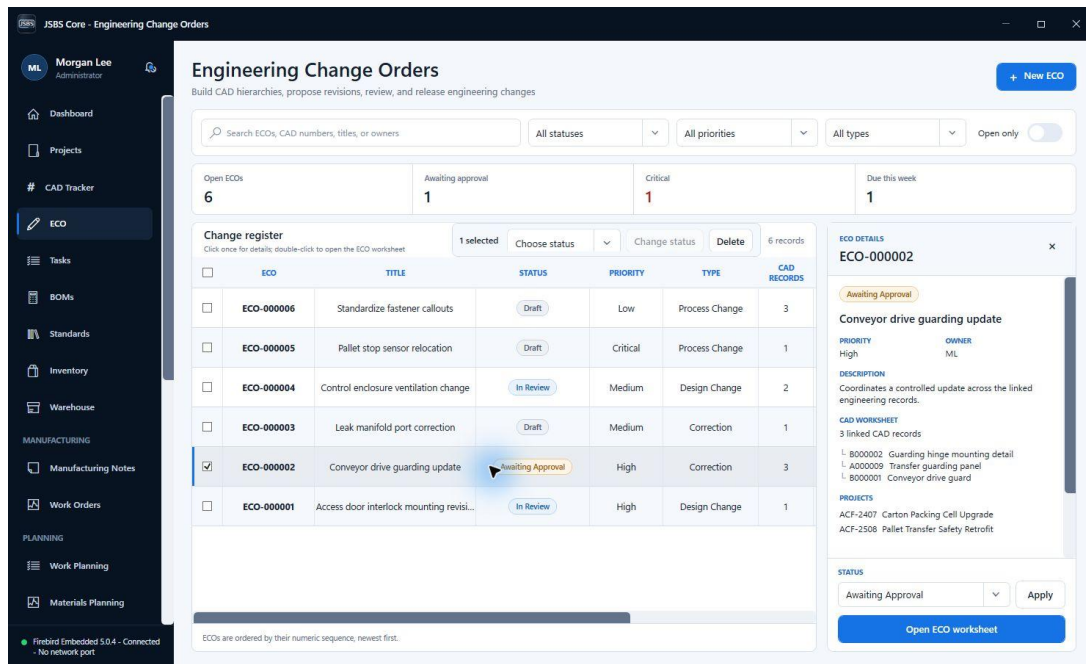


Figure 4.2. A closer view of the Engineering Change Orders workflow.

ENGINEERING CHANGE ORDERS

4.2 Connected work and record behavior

CAD Tracker	The ECO carries affected hierarchy and can control resulting revision update.
Manufacturing Notes	Approved disposition can create/link an ECO; release may close the Note when enabled.
Projects	Released ECOs linked to a Project contribute to automatic progress.
Tasks	Detailed implementation or verification work can link to the ECO.
Reports	A polished PDF includes header, reason, release details, and CAD hierarchy.

Key fields and states

Draft	The proposed change is still being defined.
Review	The change is being evaluated and is not released.
Released	The controlled change is approved for execution according to organization process.
Closed	No further ECO action is expected; release and closure remain traceable.

ECO-000002 - ECO worksheet - JSBS Core

ECO-000002 Awaiting Approval

Conveyor drive guarding update

HIGH priority • CORRECTION • Owner ML

Add existing CAD or A Numbers Create CAD Numbers in ECO

No rows selected Move to top level Save worksheet

Engineering change worksheet

Select rows, then drag the grip onto a parent assembly. The highlighted parent receives the selected rows as children.

3 rows

SELECT / MOVE	TYPE	CAD / PART NUMBER	DESCRIPTION	CURRENT REV	NEW REV	CHANGE ACTION	REFERENCE	ROW NOTE	STATUS
☐	Existing	L B000002 Top level	Guarding hinge mounting detail	A	B	Revise			Open
☐	Existing	L A000009 Top level	Transfer guarding panel	A	B	Revise			Open
☐	Existing	L B000001 Top level	Conveyor drive guard	A	B	Revise			Open

Changes stay local until Save worksheet is clicked.

Close

Figure 4.3. Connected details within Engineering Change Orders.

ENGINEERING CHANGE ORDERS

4.3 Practical reference

Recommended habits

- Keep the reason specific enough that a future reader can understand the decision.
- Verify every affected CAD record before release.
- Do not assume releasing an ECO always closes its source Note; the administrator controls it.

Troubleshooting

Release does not close a Note	Check the administrator toggle and confirm the ECO links that Note.
CAD revision did not change	Review intended revision values and confirm the ECO reached the release action.
Stale-write message	Reload, compare the newer record, and reapply only intentional edits.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

ENGINEERING CHANGE ORDERS

Copy ECOs and move assemblies

Use Create from existing to start a new Draft ECO from a selected ECO. Reuse its content while keeping the original change record intact.

1. **Select a source.** Highlight one ECO in the register and choose Create from existing.
2. **Review the new header.** Enter the new Draft details, then continue to the copied worksheet. Copied rows receive new identities, preserve their assembly relationships and reset completion status.
3. **Review the proposed change.** Check revisions, actions, references and row notes before release. Editing the new header or worksheet does not update the source ECO.

Move the assembly as a structure

Select rows and drag onto the destination assembly. If both an assembly and its descendants are selected, only the selected assembly root changes parent. Children and nested subassemblies retain their internal relationships, including descendants that were not individually selected. Move to top level follows the same rule.

For example, A000001 contains A000004, which contains A000005. Moving A000001 under A000006 keeps A000005 beneath A000004. It does not make every selected row a direct child of A000006. A target within the moved assembly itself is rejected.

Distinguish a copy from a release

CAD references remain shared master records. The explicit ECO release workflow still updates those CAD revisions; copying does not duplicate the CAD masters or authorize a change. If another user saves the worksheet first, refresh and review the latest structure before retrying a stale move.

MODULE GUIDE

5. Tasks and Sub-tasks

Break Project and engineering work into assignable actions with priorities, due dates, links, and one clearly nested layer of sub-tasks.

The screenshot displays the 'Tasks' interface in the JSBS Core application. The left sidebar shows the user 'Morgan Lee' and navigation options like Dashboard, Projects, CAD Tracker, ECO, Standards, BOMs, Inventory, Warehouse, Manufacturing Notes, Work Orders, and Work Planning. The main area shows a 'Tasks' register with a search bar, filters, and a table of tasks.

TASK	TITLE	STATUS	PRIORITY	PROJECTS	OWNER	DUE
> TASK-000004	Coordinate pallet retrofit installation	In Progress	Critical	ACF-2508	Daniel Ortiz	09/05/2026
> TASK-000002	Prepare robotic cell release package	In Progress	High	VPP-2412	Morgan Lee	09/07/2026
> TASK-000001	Complete packing cell design review	In Progress	High	ACF-2407	Alex Rivera	09/11/2026
> TASK-000006	Publish revised standard work library	In Progress	Low	INT-2511	Priya Shah	09/14/2026
TASK-000021	Issue updated electrical component list	Not Started	High	VPP-2510	Samira Bennett	09/16/2026
> TASK-000003	Validate leak test fixture concept	Not Started	Medium	HHP-2503	Priya Shah	09/17/2026
TASK-000019	Finalize modular fixture part list	Not Started	Medium	INT-2506	Daniel Ortiz	09/19/2026
> TASK-000005	Develop control migration package	Not Started	Medium	VPP-2510	Samira Bennett	09/24/2026
TASK-000020	Review washer transfer time study	Waiting	Low	HHP-2514	Morgan Lee	10/02/2026

Figure 5.1. Tasks register with one-level sub-task controls in the fictional workspace.

What to know before you start

- Sub-tasks are created and managed inside the parent Task details window.
- Only one sub-task layer is allowed; a sub-task cannot contain another sub-task.
- Parents expand in the main table so users can show or hide nested work.
- Only active leaf Tasks contribute to automatic Project progress, preventing double counting.

TASKS AND SUB-TASKS

5.1 Complete the core workflow

1. **Create the parent Task.** Enter title, status, priority, due date, description, and related records.
2. **Open Task details.** Use the Sub-tasks area to add as many first-level children as needed.
3. **Assign at the right level.** Assign the parent team and individual sub-tasks when responsibilities differ.
4. **Expand the parent.** Review child status directly in the main table.
5. **Close work bottom-up.** Complete actionable sub-tasks, then set the parent status to match the result.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

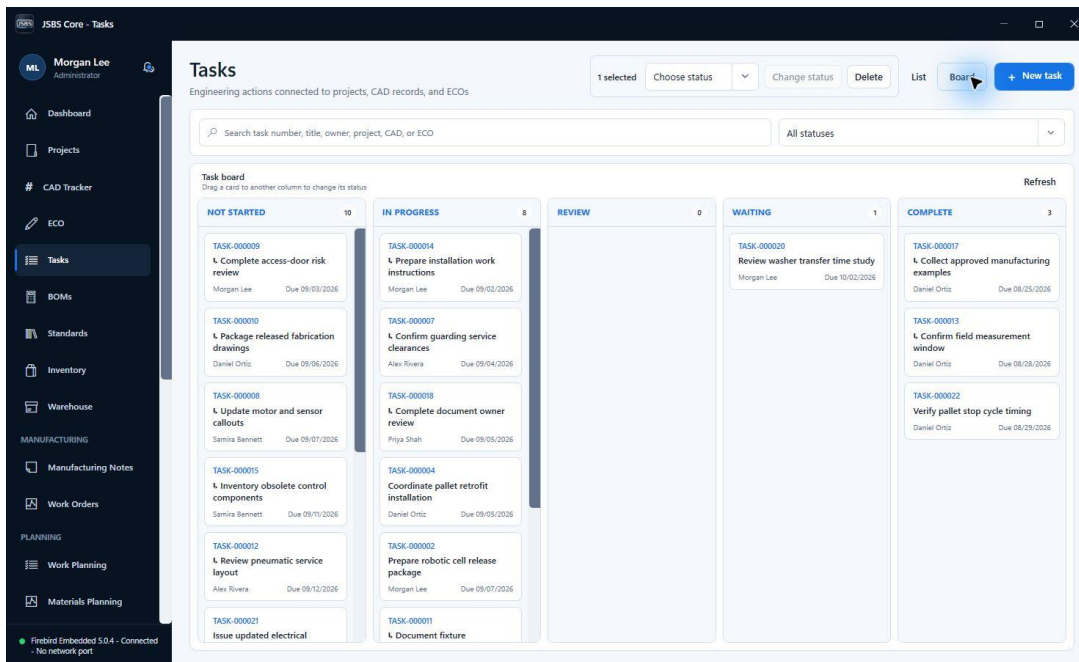


Figure 5.2. A closer view of the Tasks and Sub-tasks workflow.

TASKS AND SUB-TASKS

5.2 Connected work and record behavior

Projects	Tasks inherit linked Project teams unless a custom team is selected.
CAD and ECO	Links show engineering records the Task implements or verifies.
Dashboard	Open leaf Tasks appear in workload; completed active leaves affect Project progress.
Notifications	Assignments and due dates can create personal alerts.
Assignment history	Team changes are recorded for later review.

Key fields and states

Parent Task	A container and summary for one or more actionable sub-tasks.
Leaf Task	A Task without children; this level is used for automatic progress.
One-level rule	Sub-tasks cannot have children of their own.
Board view	Groups Tasks visually by status for workflow review.

TASKS AND SUB-TASKS

5.3 Practical reference

Recommended habits

- Make sub-task titles action-oriented and small enough that completion is clear.
- Use the parent description for shared context and child descriptions for execution details.
- Create children inside the parent details view, not by choosing a parent from New Task.

Troubleshooting

Cannot add a sub-task	Confirm you opened a parent; a sub-task cannot contain another layer.
Progress changed unexpectedly	Review active leaf status and Project links, not only the parent.
Nested rows are hidden	Expand the parent row in the main table.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

6. Bills of Materials

Define reusable product structures with quantities, pinned CAD revisions, Inventory, vendors, purchasing status, pricing history, and optional Project context.

BOM	NAME	STATUS	PROJECTS	ITEMS	ORDERED	RECEIVED
BOM-000006	Modular fixture starter set	Active	INT-2506	4	0%	0%
BOM-000005	Control enclosure refresh	Active	VPP-2510	5	0%	0%
BOM-000004	Pallet stop assembly	Active	ACF-2508	5	0%	0%
BOM-000003	Leak test fixture	Active	HHP-2503	5	0%	0%
BOM-000002	Robotic cell guarding	Active	VPP-2412	5	0%	0%
BOM-000001	Carton pusher assembly	Active	ACF-2407	5	0%	0%

Figure 6.1. BOM register showing fictional assemblies, revisions, status, line counts, and Projects.

What to know before you start

- A BOM line can link CAD, Inventory, and a preferred vendor without duplicating identities.
- The selected CAD revision is pinned on the line for traceability.
- Deleting a BOM line never deletes its Inventory, CAD, or vendor record. Use View details or Edit BOM beside New BOM after selecting a record.
- Reusable parts and vendor pricing support RFQ and purchasing workflows.

BILLS OF MATERIALS

6.1 Complete the core workflow

1. **Create the BOM header.** Enter the name, status, owner, and Projects. The number is assigned automatically. Expand Description and drawing links for more context.
2. **Add lines.** Choose Inventory, previously used parts, custom items, or CAD records. CAD additions stay in the draft alongside your other edits. Set quantity, unit, sourcing state, and notes.
3. **Link controlled records.** Connect CAD, pin the intended revision, and link Inventory and vendor when applicable.
4. **Review availability and save.** Available stock excludes allocations. Check missing vendors and sourcing decisions, then Save BOM to commit the header, links, and lines together. A failed save retains the draft.
5. **Release or report.** Follow the configured status process and generate a BOM PDF when a snapshot is needed.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

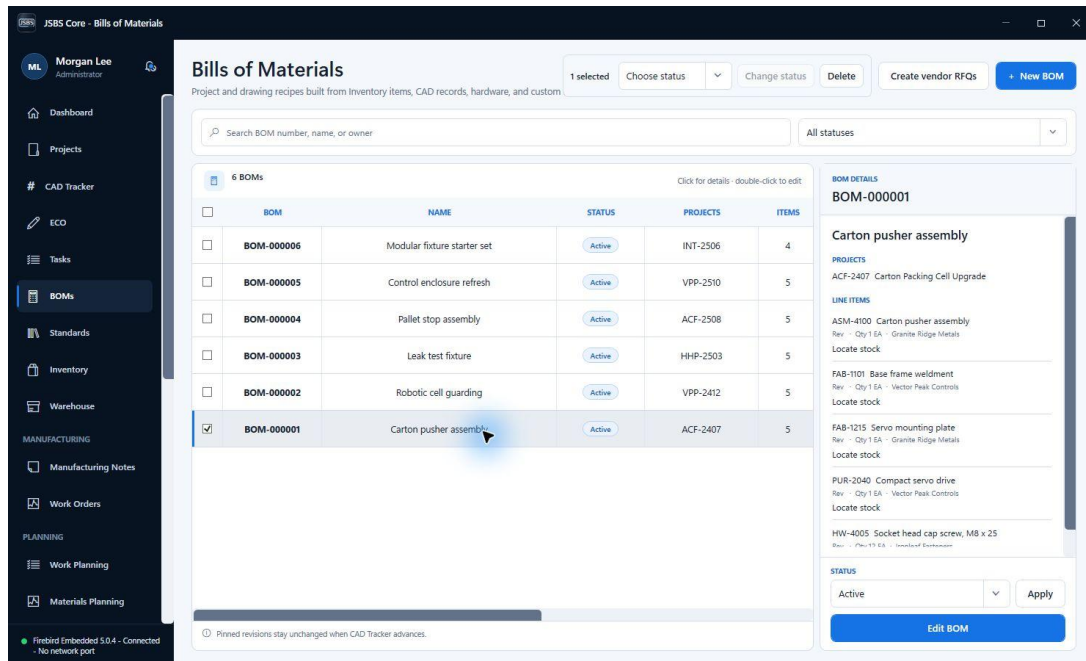


Figure 6.2. A closer view of the Bills of Materials workflow.

BILLS OF MATERIALS

6.2 Connected work and record behavior

CAD Tracker	Provides CAD identity while the BOM line preserves its selected revision.
Inventory	Links the material/part used for stock, availability, and Warehouse activity.
Vendors & Customers	Preferred vendors and pricing context support sourcing.
RFQs and Purchase Orders	Selected lines can become vendor requests and purchasing documents.
Materials Planning	Inventory assembly components drive planning explosion. A Project BOM is a separate engineering recipe; selecting it does not automatically replace that assembly structure.

Key fields and states

Quantity and unit	How much of the item is required for the BOM output.
Pinned revision	The CAD revision intentionally used by this BOM line. The subassembly view shows saved data; turn it off to continue your retained draft edits.
Purchasing status	Whether sourcing or procurement action remains.
Reusable part	A repeatable line definition used across BOMs without uncontrolled copying.

Edit BOM-000001
Reusable line items with pinned CAD revisions

BOM NAME * STATUS * OWNER PROJECTS
Carton pusher assembly Active Morgan Lee ACF-2407 Edit projects

DESCRIPTION
Controlled fictional BOM used in the JSBS Core customer guide.

PROJECT / DRAWING RECIPE TARGETS
A000003, A000001, B000001 Edit drawings

+ Add inventory items + Add custom item + Add previously used part + Add multiple CAD records Show subassembly parts Import CSV Export CSV Save import template

+ New vendor

	SOURCE	ITEM #	CAD #	PINNED REV	DESCRIPTION	QTY	ON HAND	SHORT	UNIT	STATUS	VENDOR
☐	Inventory	ASM-4100	B000003		Carton pusher assembly	1	3	0	EA	Not Ordered	Granite Ridge Metals
☐	Inventory	FAB-1101	A000001		Base frame weldment	1	2	0	EA	Not Ordered	Vector Peak Controls
☐	Inventory	FAB-1215	A000003		Servo mounting plate	1	9	0	EA	Not Ordered	Granite Ridge Metals
☐	Inventory	PUR-2040			Compact servo drive	1	4	0	EA	Not Ordered	Vector Peak Controls
☐	Inventory	HW-4005			Socket head cap screw, M8 x 25	12	420	0	EA	Not Ordered	Ironleaf Fasteners

CAD revisions are pinned when a line is added and never advance automatically.

Cancel Save BOM

Figure 6.3. Connected details within Bills of Materials.

BILLS OF MATERIALS

6.3 Practical reference

Recommended habits

- Review every pinned CAD revision before releasing a BOM.
- Link Inventory rather than typing a second part number that cannot participate in planning.
- Use price history as evidence, but confirm a current vendor response before purchasing.

Troubleshooting

Line shows old CAD revision	Repin intentionally after engineering approval; revision changes are not automatic.
Inventory usage is missing	Confirm the line links Inventory rather than containing description only.
Vendor price is absent	Select the vendor and current response; history is not a live quote.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

BILLS OF MATERIALS

Create a BOM from an existing BOM

Select a previous BOM and choose Create from existing when the next job needs the same assembly or a slightly modified version.

1. **Choose the source.** Highlight one BOM in the register, then choose Create from existing.
2. **Review the new draft.** Choose the new Project links and adjust the header, quantities and lines. The draft receives a new number and new line identities.
3. **Check purchasing context.** Descriptive content and quantities are copied. Ordered and received dates and purchasing status are reset so the new job does not inherit old fulfillment progress.
4. **Save the new BOM.** Saving opens the new copy preview. Later changes to its header or lines do not change the original BOM.

What remains shared

CAD, Inventory and vendor links still point to the existing master records. A copied BOM is an independent document, not a new set of parts or vendors. Review the pinned CAD revisions and intentionally change them when the new assembly requires a different revision.

Keep the original useful

Use the source BOM as a historical reference. Deleting a line from the new draft does not delete its Inventory, CAD or vendor record. If another user changes the same destination BOM while you edit, refresh and compare the latest values before reapplying your changes.

MODULE GUIDE

7. Standards

Maintain controlled engineering and manufacturing requirements, examples, documents, and pictures in configurable sections that serve the whole organization.

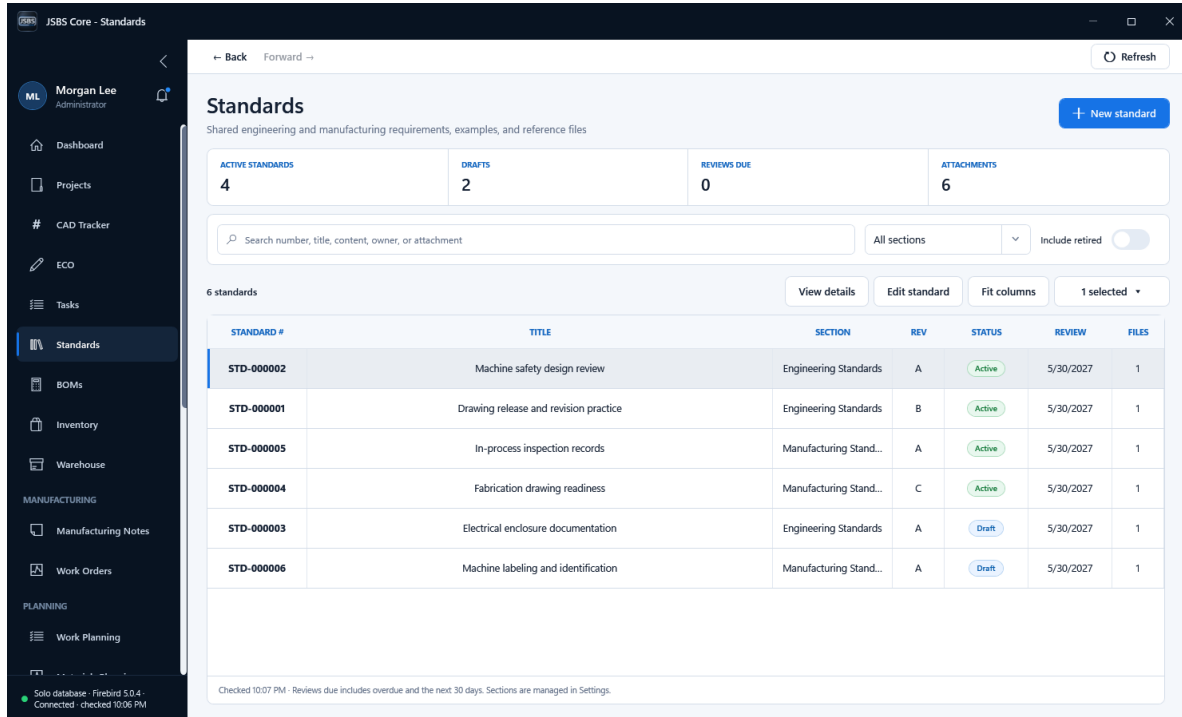


Figure 7.1. Standards register with default Engineering Standards and Manufacturing Standards sections.

What to know before you start

- Engineering Standards and Manufacturing Standards are the default sections.
- Administrators can add, rename, reorder, or deactivate sections.
- Documents and images are stored with the database; no shared folder path is required.
- Only administrators and users with Standards write permission can change a Standard.

STANDARDS

7.1 Complete the core workflow

1. **Choose the section.** Select a default or administrator-created section.
2. **Create the Standard.** Enter title, controlled number, revision, status, owner, review date, and content.
3. **Add supporting files.** Upload documents and pictures that explain the requirement or show examples.
4. **Review details.** Read content and attachments without entering edit mode.
5. **Maintain control.** Update revision, status, owner, and review date when the Standard changes.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

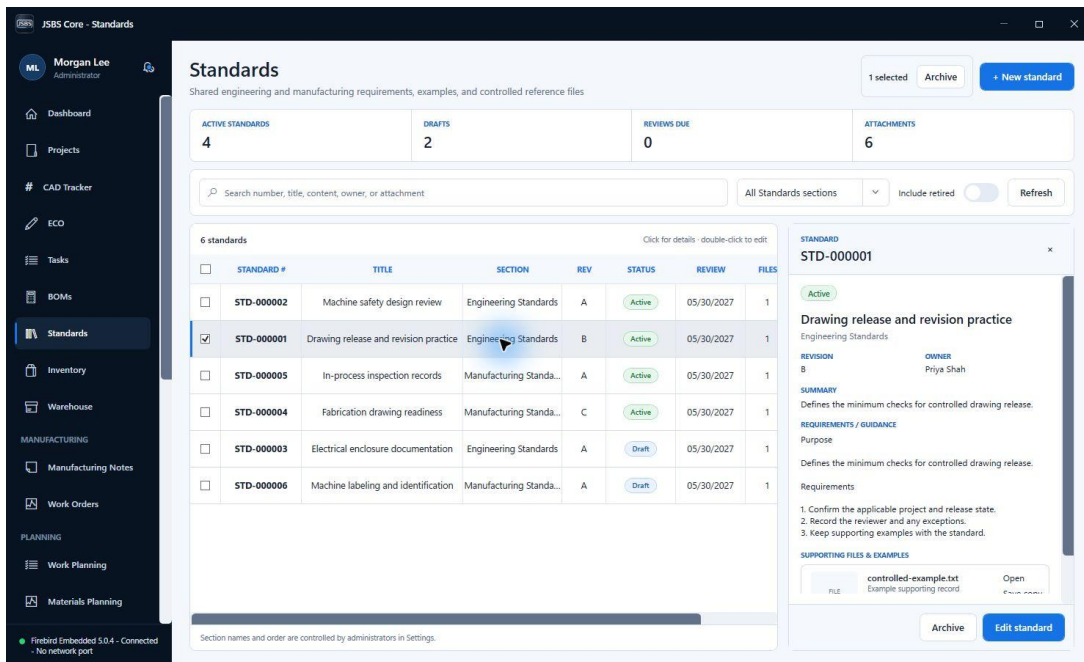


Figure 7.2. A closer view of the Standards workflow.

STANDARDS

7.2 Connected work and record behavior

Settings	Administrators maintain section names, order, and active state.
Attachments	Stored inside Firebird so database backup/restore keeps Standard and files together.
Search	Find by number, title, content, owner, section, or attachment name.
Permissions	View and write rights can be granted per user.

Key fields and states

Draft	Being prepared and not yet the active controlled requirement.
Active	The current requirement users should follow.
Review date	Planned date to verify the Standard remains appropriate.
Retired	Preserved for history but not current; show with Include retired.

Standards editor reference

The screenshot shows a web application window titled "Standard - JSBS Core". The main heading is "Edit STD-000001" with a subtitle "Create a controlled Engineering or Manufacturing standard with supporting documents and examples." The form is organized into several sections:

- SECTION ***: A dropdown menu with "Engineering Standards" selected.
- STATUS ***: A dropdown menu with "Active" selected.
- TITLE ***: A text input field containing "Drawing release and revision practice".
- SUMMARY**: A text area containing "Defines the minimum checks for controlled drawing release."
- STANDARD CONTENT**: A large text area containing:
 - Purpose
 - Defines the minimum checks for controlled drawing release.
 - Requirements
 - 1. Confirm the applicable project and release state.
 - 2. Record the reviewer and any exceptions.
 - 3. Keep supporting examples with the standard.
- REVISION ***: A text input field containing "B".
- OWNER**: A text input field containing "Priya Shah".
- EFFECTIVE DATE**: A date picker field.
- NEXT REVIEW**: A date picker field.

At the bottom right, there are two buttons: "Cancel" and "Save standard".

Figure 7.3. Connected details within Standards.

STANDARDS

7.3 Practical reference

Recommended habits

- Use short titles that distinguish one requirement from another in search.
- Put the requirement in content and use attachments as supporting evidence.
- Retire obsolete Standards instead of deleting history.

Troubleshooting

Section is missing	Confirm it is active and clear the section filter.
Cannot upload	Check Standards write permission and file access.
Retired item is hidden	Turn on Include retired.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

8. Inventory

Maintain the item master used by BOMs, purchasing, Warehouse balances, Materials Planning, Work Orders, and commercial fulfillment.

The screenshot shows the JSBS Core - Inventory application. The sidebar on the left contains navigation links for Morgan Lee (Administrator), Dashboard, Projects, CAD Tracker, ECO, Tasks, Standards, BOMs, Inventory, Warehouse, Manufacturing Notes, Work Orders, and Work Planning. The main content area is titled 'Inventory' and includes a subtitle 'Stock, reorder requirements, preferred vendors, and purchasing sources'. It features a '+ New inventory item' button and a 'Refresh' button. Below these are filters for 'ACTIVE ITEMS' (20), 'LOW STOCK' (1), and 'SELECTED FOR RFQ' (1). A search bar is provided for searching by part number, description, category, or vendor. The table below shows 20 inventory items with columns for PART #, DESCRIPTION, ON HAND, ALLOCATED, AVAILABLE, and UNIT. The items listed are ASM-4100 (Carton pusher assembly), ASM-4200 (Pallet stop assembly), FAB-1101 (Base frame weldment), FAB-1120 (Drive guard panel), FAB-1215 (Servo mounting plate), FAB-1320 (Interlock mounting bracket), and FAB-1430 (Leak test fixture platen). A footer note states: 'Available = on hand - allocated. Select an item for details, linked BOMs, or stock actions.'

Figure 8.1. Inventory register with fictional parts, descriptions, units, quantities, and sourcing context.

What to know before you start

- The Inventory record is the shared identity for a stocked or planned item. Choose Stock, Purchasing, Engineering, or All columns to focus the register.
- On-hand, allocated, and available quantities come from Warehouse balances and movements. Inventory refreshes every 30 seconds while visible, retaining your selected item and personal view.
- BOM usage shows where an item is required without copying the master record.
- Lead time and safety stock affect Materials Planning suggestions.

INVENTORY

8.1 Complete the core workflow

1. **Create the item.** Enter stable number, description, unit, type, status, and notes.
2. **Set planning and sourcing.** Add lead time, safety stock, preferred vendor, and appropriate cost context.
3. **Link engineering context.** Connect CAD or reusable BOM-part information when appropriate.
4. **Review BOM usage.** See which product structures require the item before changing key fields.
5. **Use Warehouse for quantities.** Post real movements instead of typing informal stock balances.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

The screenshot shows the 'Edit ASM-4100' form in the JSBS Core - Inventory application. The form is divided into several sections:

- Header:** 'Edit ASM-4100' with a subtitle 'Stock and preferred-vendor details used by BOMs, RFQs, and purchase orders.'
- Form Fields:**
 - Part number*:** ASM-4100
 - Item type:** Assembly
 - Description*:** Carton pusher assembly
 - Category:** Hardware
 - Preferred vendor:** Granite Ridge Metals
 - Linked CAD / hardware number:** 8000003 - CAD Tracker will show this item's on-hand quantity. (A blue circle highlights this field with a mouse cursor.)
 - Choose from CAD Tracker:** Button
 - Clear:** Button
 - Primary stock location:** MAIN / UNASSIGNED
 - Location count:** 1 location
 - Stock unit*:** EA
 - Managed in Warehouse:** (checkbox)
 - Stock Table:**

On hand	Allocated	Available	Reorder point	Reorder quantity
3	0	3	1	2
 - Unit cost:** 825.00
 - Manufacturer part #:** MFG-7000
 - Assembly recipe:** This recipe belongs to the inventoried assembly. Add Inventory items, CAD drawings, or hardware numbers and enter the quantity needed to make the output quantity.
 - Output quantity:** 1
- Buttons:** 'Cancel' and 'Save inventory item'.

Figure 8.2. A closer view of the Inventory workflow.

INVENTORY

8.2 Connected work and record behavior

BOMs	Use Inventory identity so requirements can be planned and sourced.
Warehouse	Creates location balances and immutable movement history.
Materials Planning	Nets demand against on-hand and expected supply using item policy.
Purchase Orders	Receiving purchased material creates Warehouse/Inventory effects.
Work and Sales Orders	Issues, outputs, allocations, picks, and shipments affect availability.

Key fields and states

On hand	Physical quantity posted across Warehouse locations.
Allocated	Quantity reserved for fulfillment or manufacturing demand.
Available	Usable quantity after allocations.
Safety stock	A planning buffer, not a separate physical pile.

INVENTORY

8.3 Practical reference

Recommended habits

- Keep item numbers unique and stable.
- Use a consistent unit and verify conversions when purchasing in another unit.
- Investigate differences through the Warehouse ledger before correcting quantity.

Troubleshooting

Quantity seems wrong	Review location balances and the ledger, including reversals.
Planning ignores an item	Confirm BOM/demand links Inventory and policy is usable.
Cannot delete	Deactivate or retire an item when linked history must remain.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

9. Warehouse

Control where Inventory is stored and preserve every posted receipt, move, pick, shipment, count, correction, Work Order issue/output, and reversal in an immutable ledger.

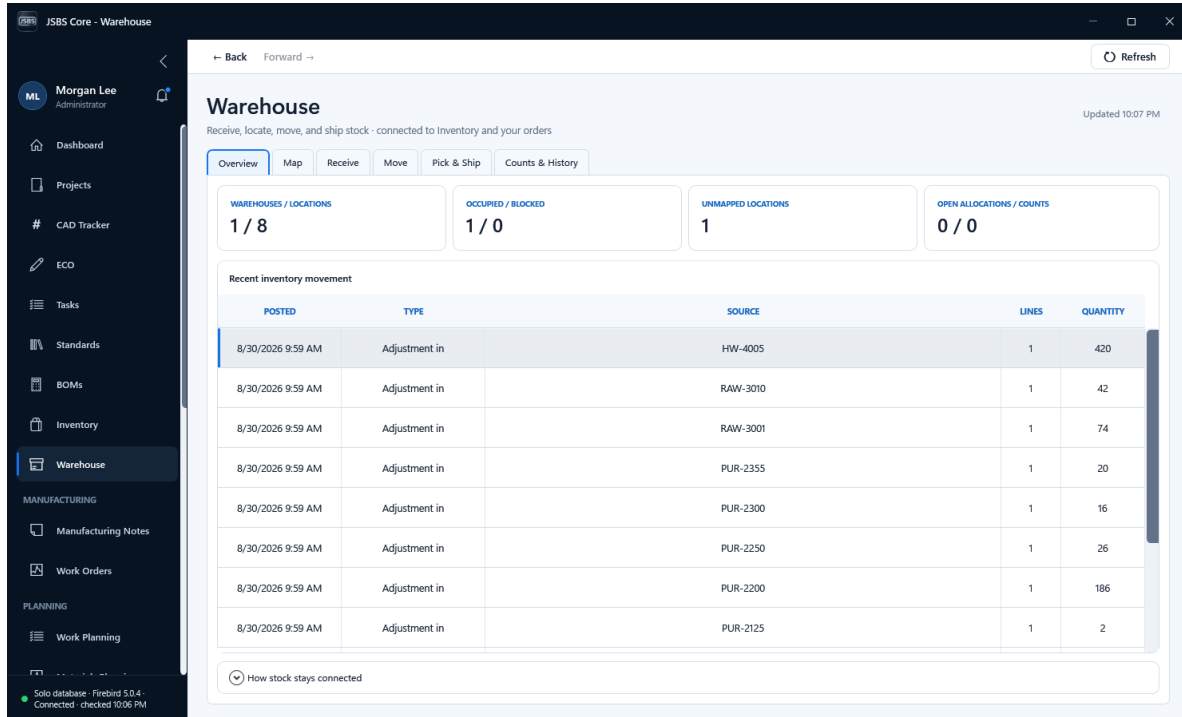


Figure 9.1. Warehouse overview showing facility, location, quantity, allocation, and availability.

What to know before you start

- Facilities, racks, and operational locations create the physical storage map.
- Posted movements are immutable; mistakes are corrected with linked reversals or new correcting movements.
- Cycle counts compare counted quantity with system quantity and post a traceable variance when approved.
- Warehouse balances are the operational source for Inventory availability and planning netting.

WAREHOUSE

9.1 Complete the core workflow

1. **Configure locations.** In Map, create or choose an area. Create racks and bins previews the codes and total; Single location handles a dock, staging point, or individual bin. Drag footprints into place, Save layout, then lock it for ordinary viewing.
2. **Post the real event.** Use receipt, move, pick, shipment, Work Order issue/output, count, or correction according to what happened.
3. **Verify the result.** Check source/destination balances and the new ledger row.
4. **Reverse errors.** Select the incorrect movement and create a reversal; never edit history to hide it.
5. **Count periodically.** Use cycle counts to reconcile selected locations with reviewer and reason.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

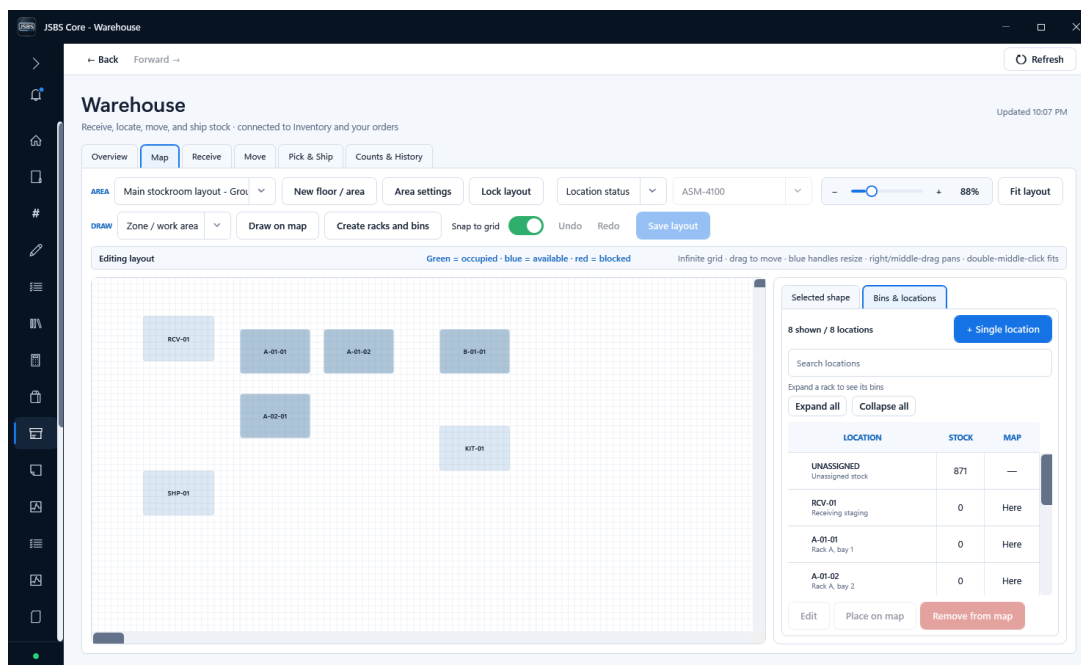


Figure 9.2. A closer view of the Warehouse workflow.

WAREHOUSE

9.2 Connected work and record behavior

Inventory	Warehouse balances roll up to the item while preserving exact locations.
Purchase Orders	Receipts add purchased material to a selected location.
Sales Orders and Packing Slips	Allocations, picks, and shipments reduce available or on-hand stock.
Work Orders	Material issues and finished outputs post linked movements.
Reports	On-Hand and Movement Ledger PDFs provide operational snapshots.

Key fields and states

Receipt	Adds quantity to a location from an external source.
Move	Transfers quantity between internal locations.
Pick/Shipment	Moves or removes material for fulfillment.
Correction/Reversal	Preserves the original event and adds a traceable offsetting event.

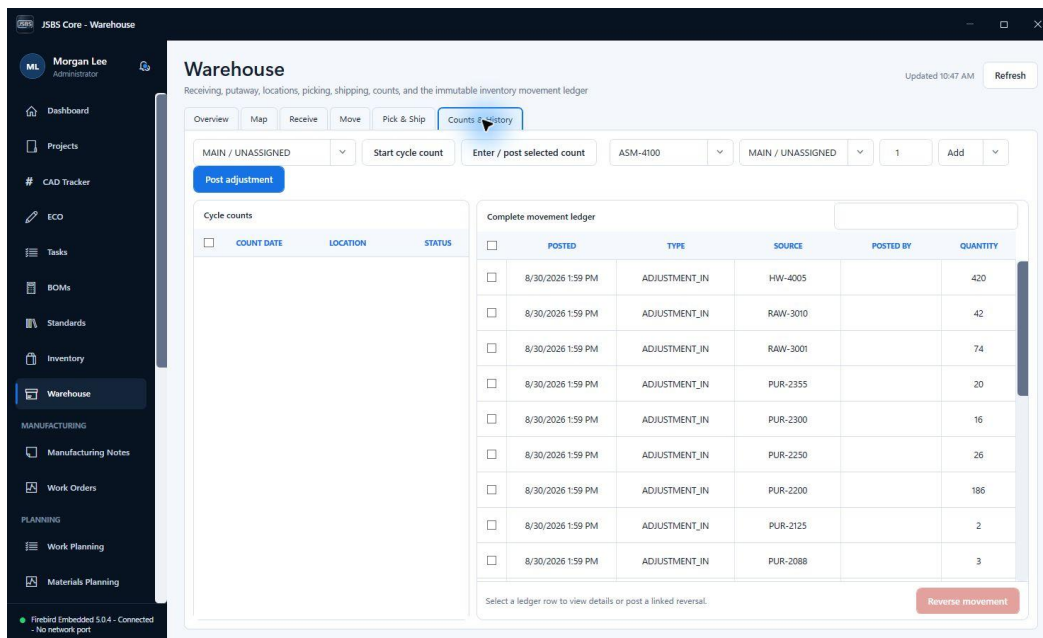


Figure 9.3. Connected details within Warehouse.

WAREHOUSE

9.3 Practical reference

Recommended habits

- In Bins & locations, expand a rack to see its indented bins. Search keeps matching bins with their rack context; collapsing a rack removes hidden bin selections from bulk actions.
- Use locations such as Receiving or Staging when the physical process needs them.
- Include a useful reason and reference on corrections, counts, and reversals.

Troubleshooting

Cannot post a move	Confirm both locations are active and source has sufficient usable quantity.
Map looks empty	Choose or create a map area, then create racks and bins or place an existing location. Locations can exist without a map shape. Creating bins does not post stock.
A mistake is in history	Create a reversal from the selected row; do not search for Edit.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

10. Manufacturing Notes

Capture shop-floor feedback, link it to CAD and Projects, add documents or pictures, record engineering disposition, and optionally coordinate CAD attention and ECO-driven closure.

Manufacturing Notes
Production feedback linked directly to engineering records

OPEN FLAGS IN VIEW: 8 URGENT OPEN FLAGS: 3 NOTES IN VIEW: 8

Search note number, text, author, project, CAD, ECO, or task

Open flags only: ☒

View details Edit note Fit columns 1 selected

8 notes in this view

NOTE NUMBER	NOTE	TAG	URGENCY	PROJECTS	AUTHOR	FOLLOW-UP
NOTE-000008	Fixture platen edge should be broken before the nest insert is installed.	Safety	Normal	HHP-2503	Priya Shah	Open 09/30/2026
NOTE-000007	Weld symbol example should include the preferred sequence for intermittent welds.	Documentation	Normal	INT-2511	Morgan Lee	Open 09/27/2026
NOTE-000006	Locator block engraving is hard to read after black oxide finishing.	Quality	Normal	INT-2506	Daniel Ortiz	Open 09/24/2026
NOTE-000005	Backplate layout should reserve space for the replacement network switch.	Issue	Normal	VPP-2510	Samira Bennett	Open 09/21/2026
NOTE-000004	Sensor mount places the cable connector too close to the pallet guide rail.	Needs Revision	Critical	ACF-2508	Daniel Ortiz	Open 09/18/2026
NOTE-000003	Manifold labels should be visible from the normal maintenance side of the fixture.	Documentation	Normal	HHP-2503	Alex Rivera	Open 09/15/2026

Column order and visibility can be personalized in Settings.

Figure 10.1. Manufacturing Notes register showing fictional feedback, CAD references, status, priority, dates, and assignees.

What to know before you start

- A Manufacturing Note is feedback, not automatic approval for a design change.
- Documents and pictures are stored with the database; no shared attachment folder is required.
- Engineering disposition records whether the Note needs no change, clarification, or controlled change.
- Separate administrator toggles control CAD attention and closure from a released linked ECO.

MANUFACTURING NOTES

10.1 Complete the core workflow

1. **Create the Note.** Describe what was observed, where, priority, action date, and people or Project involved.
2. **Link CAD and Projects.** Select stable records so users can find feedback from either side.
3. **Add evidence.** Upload photos, documents, measurements, or example images.
4. **Record disposition.** Engineering decides whether controlled change is required; do not infer approval from the flag.
5. **Link and release an ECO when required.** Verify Note and CAD state follow administrator settings.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

Manufacturing Notes screen reference

JSBS

Manufacturing note - JSBS Core

— □ ×

Edit manufacturing note

Capture production feedback and keep linked engineering records in sync

Note *

Sensor mount places the cable connector too close to the pallet guide rail.

Tag *

Needs Revision

Urgency *

Critical

Follow-up date

9/18/2026

Open flag requiring follow-up

LINKED RECORDS

Projects: 1

CAD: 1

ECOs: 1

Tasks: 1

SUPPORTING FILES

Add files

Cancel Save note

Figure 10.2. A closer view of the Manufacturing Notes workflow.

MANUFACTURING NOTES

10.2 Connected work and record behavior

CAD Tracker	Shows prominent open-feedback/needs-revision context without forcing a design decision.
ECO	Controls an approved change and can close the source Note when enabled.
Projects	Provide program context and inherited assignment teams.
Work Planning	Supports multiple assignees, custom teams, reassignments, and history.
Attachments	Travel with database backup/restore because they are stored in the record.

Key fields and states

Open	Feedback still needs review or action.
Disposition	The engineering decision about whether and how feedback proceeds.
Needs revision	A CAD attention state; not the same as an approved ECO.
Closed	No further Note action is expected; links and disposition remain traceable.

The screenshot displays the 'Manufacturing Notes' interface within the JSBS Core application. The left sidebar shows navigation options: Dashboard, Projects, CAD Tracker, ECO, Tasks, BOMs, Standards, Inventory, Warehouse, Manufacturing (selected), Work Orders, Work Planning, and Materials Planning. The main content area is titled 'Manufacturing Notes' and includes a search bar, filters for 'OPEN FLAGS' (8), 'HIGH / CRITICAL' (3), and 'TOTAL NOTES' (8). A table lists 8 notes with columns for Note Number, Note, Tag, Urgency, and Priority. The note 'NOTE-000004' is selected, showing details on the right: 'Sensor mount places the cable connector too close to the pallet guide rail.' The note is tagged 'Needs Revision' with a 'Critical' urgency. The 'FOLLOW-UP STATE' is 'Open: True'. The 'PROJECTS' section lists 'ACF-2508 Pallet Transfer Safety Retrofit'. The 'CAD RECORDS' section shows a link to 'B0000008 Presence sensor mount' with a note 'Accepted for engineering change - Engineering decision'. The 'FOLLOW-UP STATE' section has a dropdown set to 'Open' and an 'Apply' button. An 'Edit note' button is at the bottom.

Figure 10.3. Connected details within Manufacturing Notes.

MANUFACTURING NOTES

10.3 Practical reference

Recommended habits

- Write the observation so someone outside the immediate work area can understand it.
- Photograph context as well as the close-up problem when safe and appropriate.
- Do not close only because an ECO exists; confirm release or a no-change disposition.

Troubleshooting

CAD was not flagged	Check the administrator toggle and confirm the correct CAD link.
Released ECO did not close the Note	Check the separate closure toggle and ECO-to-Note link.
Attachment will not open	Confirm read permission and database connection; no shared folder is expected.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

11. Work Orders

Plan and execute manufacturing work with deliverables, routing, operations, material issues, actual activity, finished output, Projects, and Warehouse traceability.

Work Orders
Plan the build, issue materials, and record production

Planned: 1, Released / In Progress: 3, Overdue: 0, Complete: 0

Search order, project, deliverable, or reference

4 order(s) in this view - 1 selected

WORK ORDER	PROJECT	BUILD / DELIVERABLE	STATUS	GOOD / ORDERED	REQUIRED BY
WO-000004	INT-2506	ASM-4200 Pallet stop assembly	In Progress	0 / 3	9/23/2026
WO-000003	VPP-2412	ASM-4100 Carton pusher assembly	Planned	0 / 2	9/28/2026
WO-000002	ACF-2508	ASM-4200 Pallet stop assembly	Released	0 / 6	9/11/2026
WO-000001	ACF-2407	ASM-4100 Carton pusher assembly	In Progress	0 / 4	9/17/2026

WO-000004 - Issue materials, log operations, and record finished output
0/3 operations complete - 3 material lines - output: ASM-4200

Project workspace BOM Inventory

Figure 11.1. Work Orders register with fictional deliverables, status, quantities, dates, and Projects.

What to know before you start

- A Work Order represents planned manufacturing output, not a generic Task.
- Routing and operations describe the intended sequence and work centers.
- Material issues and finished outputs create linked Warehouse movements.
- Actual operation information supports execution history; capacity planning is intentionally deferred from this release.

WORK ORDERS

11.1 Complete the core workflow

1. **Create the Work Order.** Choose a Project, describe the build or select an Inventory output, then set quantity, dates and status. Every new Work Order needs a Project; stocked and custom deliverables share this job anchor.
2. **Select or define routing.** Confirm required operations and work-center sequence.
3. **Issue material.** Post real quantities from the correct Warehouse locations.
4. **Record execution.** Open the selected order from the top action. Order details, Materials, Operations and Output separate planning from posting. Select the relevant row before issuing material or recording an operation.
5. **Record output and close.** For an Inventory-backed output, post finished quantity to a Warehouse location. For a custom deliverable without Inventory, record completion without a stock receipt. Review remaining work before closing.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

Work Order - JSBS Core

WO-000004 Refresh

INT-2506 - In Progress - 0 good / 3 ordered

Order details | Materials | Operations | Output

Every Work Order belongs to one Project. Link an Inventory output only when completed quantity should be received into stock; custom or one-off project work can remain non-stock.

Project * INT-2506 — Shop Fixture Standardization **Status *** In Progress **Routing** RTG-4200 - Pallet stop assembly

Deliverable code ASM-4200 **Build / deliverable description *** Pallet stop assembly

Optional job, part, or drawing shorthand. What this Work Order is making or completing for the Project.

Inventory output (optional) ASM-4200 **Reference BOM** BOM-000006 - Mod **Drawing / CAD** A000012 - Modular f **Output posting** Use Record output after the Work Order is saved. Inventory locations are chosen for each posting.

Project, output item, ordered quantity, BOM, and routing are fixed after creation to preserve the material and operation snapshots.

Quantity ordered * 3 **Posted good output** 0 **Recorded scrap** 0 **Required by *** 9/23/2026

Release date 8/30/2026 **Customer / job reference** DEMO-PO-INT-2506 **Work Order notes** Fictional work order used in customer-facing docu

Close Save details

Figure 11.2. A closer view of the Work Orders workflow.

WORK ORDERS

11.2 Connected work and record behavior

Projects	Provide delivery and program context.
BOMs and Inventory	Define planned material and item identities.
Warehouse	Records material issues and finished outputs as immutable movements.
Materials Planning	Open output can be expected supply while component requirements create demand.
Manufacturing setup	Administrators maintain work centers, types, routings, and defaults.

Key fields and states

Planned quantity	The intended Work Order output.
Routing	The ordered manufacturing operations.
Material issue	A posted Warehouse reduction tied to production.
Finished output	An Inventory-backed output posts a Warehouse increase. Custom output without Inventory records completion only.

WORK ORDERS

11.3 Practical reference

Recommended habits

- Verify deliverable, quantity, and routing before releasing work.
- Post actual physical material and output, not estimates as completed transactions.
- Review Warehouse movement links before reversing production activity.

Troubleshooting

Material cannot be issued	Check location, available quantity, item identity, and Work Order status.
Output is missing from stock	Confirm output was posted to an active Warehouse location.
Routing is unavailable	Ask an administrator to review manufacturing setup and active routing.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

12. Work Planning

Assign multi-person Project teams, balance linked ECO/Task/Manufacturing Note work, find unassigned or overdue items, choose inherited versus custom teams, and review assignment history.

Work Planning
See who is doing the work and open the linked record

OPEN ITEMS IN VIEW: 41 OPEN - UNASSIGNED: 0 OPEN - OVERDUE: 3 OPEN - DUE IN 7 DAYS: 13

Search work, person, or project: All users

Include closed: ☐ Unassigned only: ☐

Open source record Assignment history Fit columns

WORK ITEM	WORK / PROJECT	STATUS	PRIORITY	ASSIGNED TEAM	ACTION DATE
TASK-000014 Task	Prepare installation work instructions ACF-2508	In Progress	Critical	Alex Rivera, Priya S... Uses project team	Sep 2, 2026
TASK-000009 Task	Complete access-door risk review VPP-2412	Not Started	High	Daniel Ortiz, Samir... Uses project team	Sep 3, 2026
TASK-000007 Task	Confirm guarding service clearances ACF-2407	In Progress	High	Alex Rivera, Morga... Uses project team	Sep 4, 2026
TASK-000004 Task	Coordinate pallet retrofit installation ACF-2508	In Progress	Critical	Alex Rivera, Priya S... Uses project team	Sep 5, 2026
TASK-000018 Task	Complete document owner review INT-2511	In Progress	Medium	Daniel Ortiz, Samir... Uses project team	Sep 5, 2026
TASK-000010 Task	Package released fabrication drawings VPP-2412	Not Started	Medium	Daniel Ortiz, Samir... Uses project team	Sep 6, 2026

41 work items in this view - 1 selected

Figure 12.1. Work Planning register with open, unassigned and overdue totals, effective assignees, and standard toggle filters.

What to know before you start

- Projects can have no team, one user, or several users.
- Linked work inherits the combined Project teams by default.
- A child record can switch to a custom team without changing the Project team.
- Every assignment change is stored; Assignment history opens a dedicated timeline.

WORK PLANNING

12.1 Complete the core workflow

1. **Find the work.** Search or filter by type, user, status, Unassigned only, or Include closed.
2. **Select the record.** Review current effective assignees and linked Project context.
3. **Manage the team.** Add multiple users, remove users, or leave unassigned when intentional.
4. **Choose inheritance or custom ownership.** Use Project teams normally and custom only when responsibility differs.
5. **Review history.** Open Assignment history to see who changed the team, when, and which members changed.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

WORK PLANNING

12.2 Connected work and record behavior

Projects	Project teams form the normal ownership baseline.
ECOs, Tasks, Manufacturing Notes	Use inherited or custom teams and appear in workload views.
Dashboard	User workload uses effective assignments and due dates.
Notifications	New effective assignments can alert assigned users.
Sub-tasks	Individual sub-tasks may have assignees inside parent Task details.

Key fields and states

Inherited team	The combined team from all linked Projects.
Custom team	A team maintained directly on one work item.
Unassigned	No effective user owns the open record.
Assignment history	An append-only timeline of assignment changes.

WORK PLANNING

12.3 Practical reference

Recommended habits

- Review Unassigned only on a regular schedule.
- Use multiple assignees for shared work, but clarify responsibilities in descriptions or sub-tasks.
- Assignment history records the membership changes. Record the reason separately in the work item notes when the decision needs explanation; reassignment has no dedicated reason field.

Troubleshooting

Unexpected team	Check every linked Project and inherited/custom assignment mode.
Cannot reassign	Work Planning write permission is required.
Closed work is missing	Turn on Include closed.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

13. Materials Planning

Turn confirmed demand and product structure into a time-phased view of shortages and suggested supply while keeping Inventory and Warehouse as the source of actual stock.

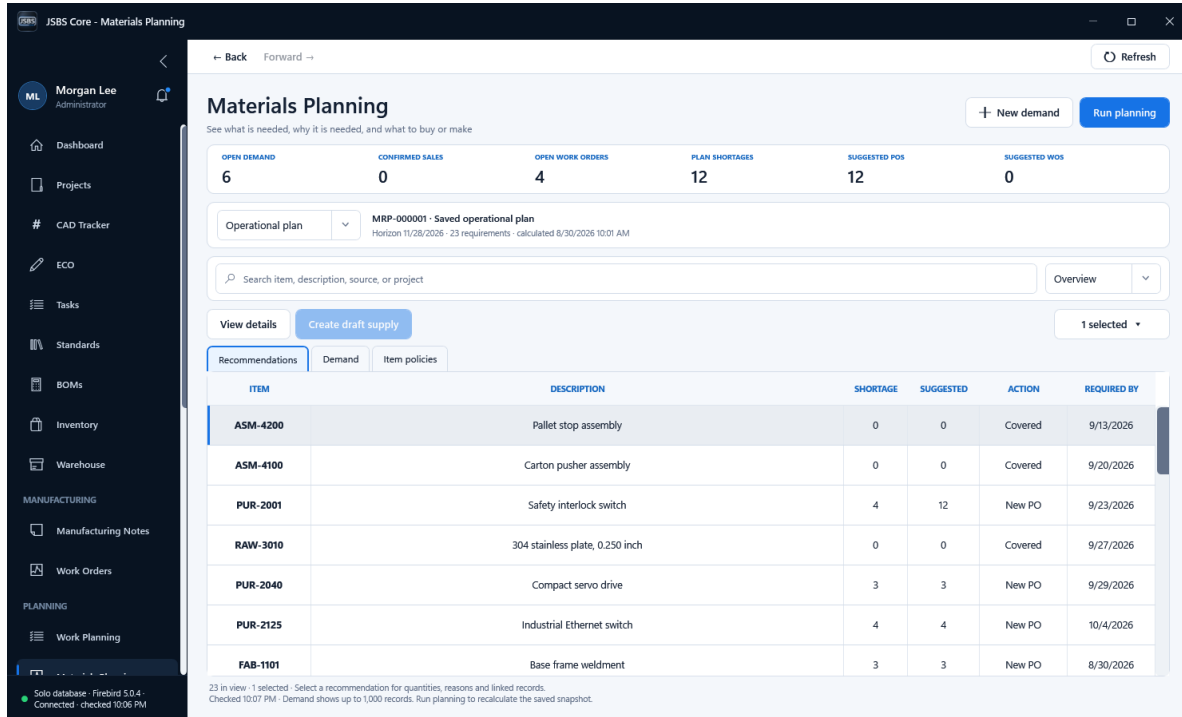


Figure 13.1. Materials Planning showing demand, on-hand and expected supply, shortages, and suggested actions.

What to know before you start

- Demand comes from confirmed sales demand and manually entered planning demand.
- BOM explosion converts parent demand into component requirements.
- The plan nets requirements against Warehouse on-hand, expected purchase supply, and expected Work Order supply. Assembly expansion uses Inventory assembly components; a Project BOM is a separate engineering recipe and is not automatically the planning assembly.
- Suggestions are planning advice; they do not silently create Purchase Orders or Work Orders.

MATERIALS PLANNING

13.1 Complete the core workflow

1. **Confirm item setup.** Review lead time, safety stock, preferred source, and usable BOM structure.
2. **Create or confirm demand.** Use confirmed sales demand for orders and manual demand for authorized scenarios.
3. **Run or refresh the plan.** Allow BOM explosion and supply netting by need date.
4. **Investigate shortages.** Open the item and related demand before accepting the suggestion.
5. **Create controlled supply.** Use purchasing or manufacturing modules for the actual PO or Work Order, then refresh.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

The screenshot displays the 'Materials Planning' interface. At the top, there are summary boxes for 'OPEN DEMAND' (6), 'CONFIRMED SALES' (0), 'OPEN WORK ORDERS' (4), 'SHORTAGES' (12), 'SUGGESTED POS' (12), and 'SUGGESTED WOS' (0). Below these, a status bar shows 'MRP-000001 Horizon 11/28/2026 - 23 requirements - 12 shortages - run 8/30/2026 2:01 PM' with 'Refresh' and 'Create supply for selected' buttons.

The main table is titled 'Demand' and has columns: DEMAND #, ITEM #, DESCRIPTION, QTY, REQUIRED BY, PRIORITY, STATUS, SOURCE, and PROJECT. It lists six items:

DEMAND #	ITEM #	DESCRIPTION	QTY	REQUIRED BY	PRIORITY	STATUS	SOURCE	PROJECT
DM-000002	ASM-4200	Pallet stop assembly	8.0000	9/13/2026	Critical	OPEN		ACF-2508
DM-000001	ASM-4100	Carton pusher assembly	6.0000	9/20/2026	High	OPEN		ACF-2407
DM-000003	PUR-2001	Safety interlock switch	12.0000	9/23/2026	High	OPEN		VPP-2412
DM-000006	RAW-3010	304 stainless plate, 0.250 inch	20.0000	9/27/2026	Normal	OPEN		HHP-2503
DM-000004	PUR-2040	Compact servo drive	5.0000	9/29/2026	Normal	OPEN		ACF-2407
DM-000005	PUR-2125	Industrial Ethernet switch	4.0000	10/4/2026	Normal	OPEN		VPP-2510

At the bottom, a note states: 'Double-click a manual demand or item policy to edit it. Planning snapshots never create supply automatically.'

Figure 13.2. A closer view of the Materials Planning workflow.

MATERIALS PLANNING

13.2 Connected work and record behavior

Sales Orders	Confirmed dated lines can drive item requirements.
BOMs	Explode parent demand into component quantities.
Inventory and Warehouse	Provide item policy and actual location-level on-hand.
Purchase Orders	Eligible open ordered quantities can be expected supply.
Work Orders	Planned output is expected supply and component needs are demand.

Key fields and states

Gross demand	Total dated requirement before supply is considered.
Net requirement	Remaining need after applicable on-hand and expected supply.
Safety stock	A policy buffer considered when determining shortage.
Suggested action	Recommendation to buy, make, expedite, or review—not an automatic transaction.

MATERIALS PLANNING

13.3 Practical reference

Recommended habits

- Treat Materials Planning as coordination between demand and supply, not replacement for Inventory or Warehouse.
- Resolve bad dates, missing BOM links, and duplicate demand before acting.
- Refresh after PO, receipt, Work Order, issue, output, cancellation, or demand-date changes.

Troubleshooting

Shortage remains after purchase	Confirm PO item, open quantity, and expected date are eligible supply.
Demand is too high	Check manual and sales demand, BOM quantity, and duplicate links.
Available stock differs	Warehouse balances and allocations—not informal counts—drive the plan.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

14. RFQs

Request current vendor pricing and terms for selected materials or BOM lines while preserving vendor responses and source traceability for later purchasing decisions.

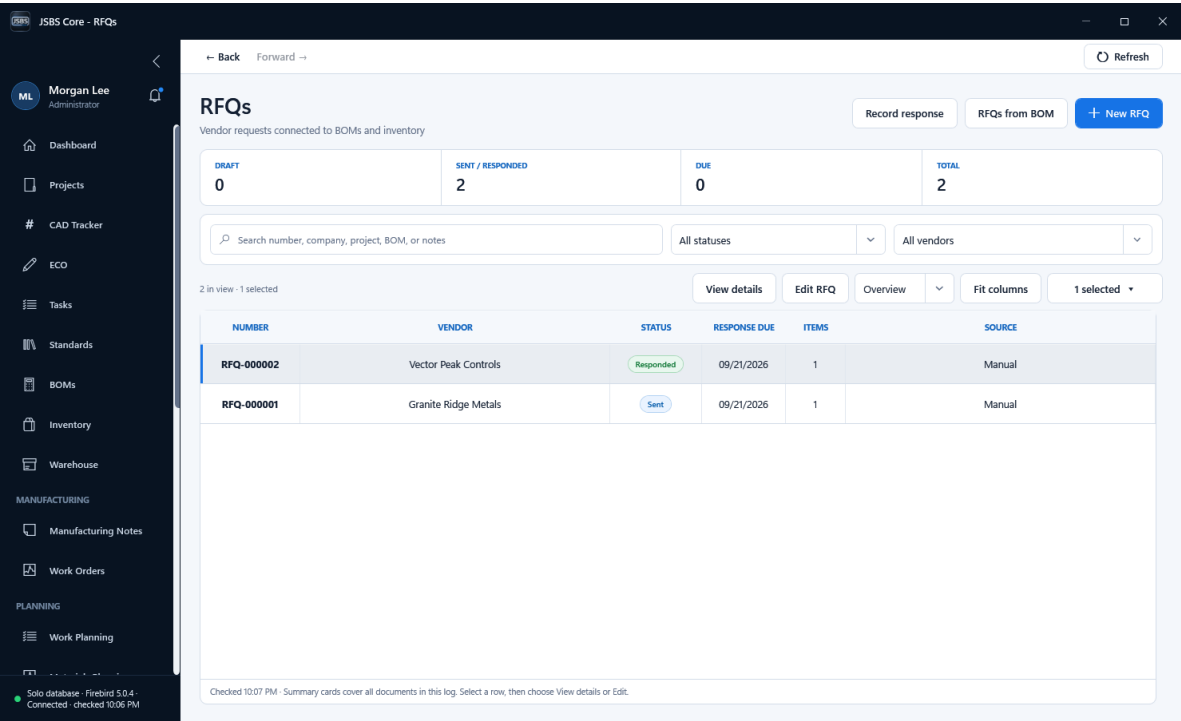


Figure 14.1. RFQ register in the fictional workspace.

What to know before you start

- An RFQ is a request for vendor information, not a commitment to buy.
- BOM lines can be selected to avoid retyping parts and quantities.
- Vendor responses preserve price, lead-time, and qualification context.
- Approved purchasing decisions move into Purchase Orders rather than changing stock directly.

RFQS

14.1 Complete the core workflow

1. **Create the RFQ.** Choose vendor, dates, Project context, contact, currency, and request notes.
2. **Add lines.** Select BOM lines or Inventory items and confirm quantity, unit, and requested delivery.
3. **Issue through the approved process.** Review the customer-branded document and contact details before sharing.
4. **Record vendor responses.** Enter price, lead time, validity, and response notes.
5. **Use the result.** Create or update a Purchase Order from the approved decision; keep the RFQ as evidence.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

RFQS

14.2 Connected work and record behavior

BOMs and Inventory	Provide controlled item, quantity, and sourcing context.
Vendors & Customers	Provides vendor identity, address, contacts, and terms.
Purchase Orders	Carry the purchasing commitment after approval.
Price history	Responses provide evidence for comparison without becoming a live price automatically.

Key fields and states

Request date	When the inquiry is prepared or issued.
Response due	When vendor input is needed.
Quoted lead time	Vendor estimate used in sourcing and planning review.
Validity	How long the commercial response applies.

RFQS

14.3 Practical reference

Recommended habits

- Send the same technical scope to every vendor being compared.
- Record freight, tooling, minimum quantity, and validity when they affect the decision.
- Do not use an old response as a current commitment without reconfirmation.

Troubleshooting

BOM line unavailable	Confirm it is active and links the intended Inventory/CAD identity.
Vendor missing	Create or activate the vendor in Vendors & Customers.
Price did not affect stock	RFQs do not receive material; use a PO receipt and Warehouse location.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

15. Quotes

Prepare a customer-facing offer with customer branding, lines, pricing, terms, Project context, and acceptance state that can become a Sales Order without losing its source.

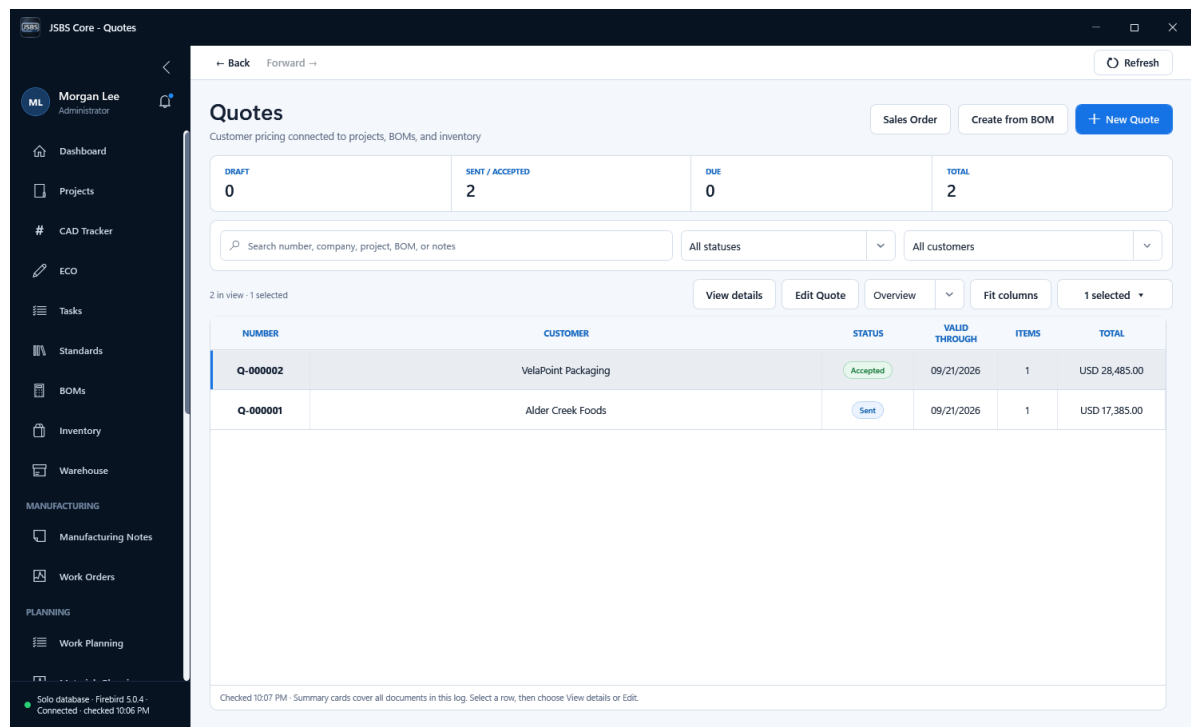


Figure 15.1. Quotes register in the fictional workspace.

What to know before you start

- A Quote is an offer, not confirmed demand until accepted and converted.
- Customer and company branding come from Settings and the business-partner record.
- Lines preserve price, quantity, tax/discount context, and source traceability.
- Conversion carries the source link into the Sales Order.

QUOTES

15.1 Complete the core workflow

1. **Choose the customer.** Confirm billing/shipping contacts and terms.
2. **Create the header.** Set dates, validity, currency, Project/reference, and customer message.
3. **Add and price lines.** Enter offered items/services, quantities, units, prices, and adjustments.
4. **Review the document.** Check branding, addresses, totals, scope, terms, and validity.
5. **Record the outcome.** Accept, decline, or expire according to result; convert accepted work to a Sales Order.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

QUOTES

15.2 Connected work and record behavior

Vendors & Customers	Supplies customer identity, address, contacts, and terms.
Projects	Provides delivery context when the offer relates to a Project.
Sales Orders	An accepted Quote becomes confirmed order demand while retaining source.
Settings	Company branding and commercial defaults affect customer-facing output.

Key fields and states

Draft	Still being prepared and not the final offer.
Issued	Shared with the customer according to company procedure.
Accepted	Approved by the customer and ready for order conversion.
Declined/Expired	Preserved for history but not active demand.

QUOTES

15.3 Practical reference

Recommended habits

- Confirm validity and delivery assumptions before issuing.
- Preview the customer-facing PDF to catch address, branding, and line errors.
- Convert instead of retyping so traceability and pricing remain connected.

Troubleshooting

Wrong logo or company details	Review administrator company branding in Settings.
Customer address wrong	Correct the partner or document-specific address according to policy.
Quote does not create demand	Only confirmed order activity drives demand; convert it to a Sales Order.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

16. Sales Orders

Convert accepted Quotes into confirmed customer demand, retain Project and source Quote links, and review dates, lines and Warehouse fulfillment.

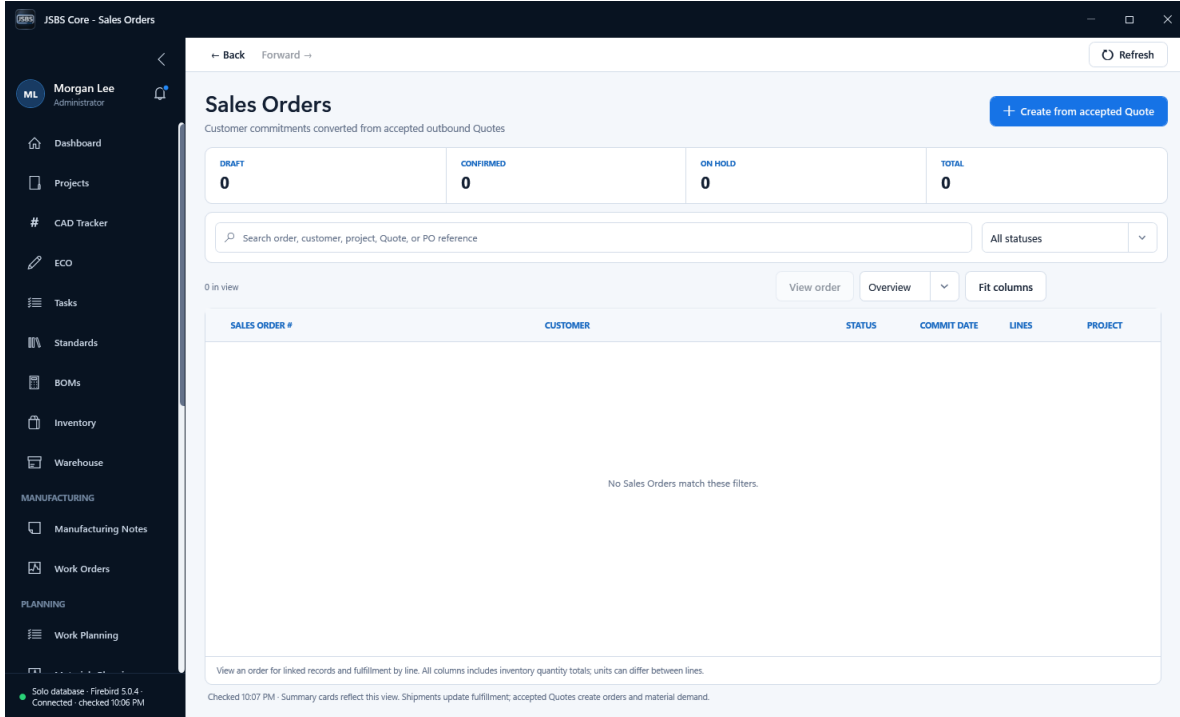


Figure 16.1. Sales Orders register; this fictional view demonstrates a filtered or newly initialized list.

What to know before you start

- A Sales Order is confirmed customer demand and can feed Materials Planning.
- Create a Sales Order by converting an accepted Quote. Direct Sales Order entry is not available.
- Inventory-backed fulfillment uses Warehouse allocations and shipments. Billing documents are managed separately; there is no direct Sales Order-to-Invoice conversion.
- The source Quote remains linked so commercial history is not lost.

SALES ORDERS

16.1 Complete the core workflow

1. **Convert an accepted Quote.** In Quotes, select an accepted record and choose Create Sales Order. Confirm the committed date and customer PO; each Quote converts once.
2. **Confirm lines and dates.** Review quantity, unit, price, committed date, tax, and shipping context.
3. **Confirm operational demand.** Use the appropriate confirmed status so Materials Planning recognizes the order.
4. **Allocate and fulfill.** Coordinate availability and prepare Packing Slips for actual shipments.
5. **Review fulfillment and billing.** Warehouse shipments determine fulfillment for Inventory-backed lines. Prepare billing separately using the customer, Project and commercial source references.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

SALES ORDERS

16.2 Connected work and record behavior

Quotes	Supply accepted scope, pricing, and source traceability.
Materials Planning	Confirmed dated lines create demand.
Inventory and Warehouse	Support allocation, pick, shipment, and availability.
Packing Slips	Document physical shipment and related Warehouse movements.
Invoices	Document amounts billed for delivered or billable work.

Key fields and states

Draft	Order is being prepared and should not drive committed execution.
Confirmed	Approved customer demand for operational planning.
Partially fulfilled	Some quantity shipped; remaining quantity stays open.
Closed	No further fulfillment is expected.

SALES ORDERS

16.3 Practical reference

Recommended habits

- Do not confirm until quantities and dates reflect the customer commitment.
- Keep partial shipments connected to the same Sales Order.
- Refresh Materials Planning after date, quantity, cancellation, or status changes.

Troubleshooting

Demand missing	Confirm order/line status, need date, Inventory identity, and remaining quantity.
Cannot ship full quantity	Review Warehouse available quantity, allocations, location, and prior shipments.
Source Quote absent	Sales Orders originate from accepted Quotes. Check access to Quotes and ask an administrator to inspect a missing source link.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

17. Purchase Orders

Commit approved purchases to vendors, track expected supply and due dates, receive material into Warehouse, and preserve links to RFQ, BOM, Inventory, Project, and vendor context.

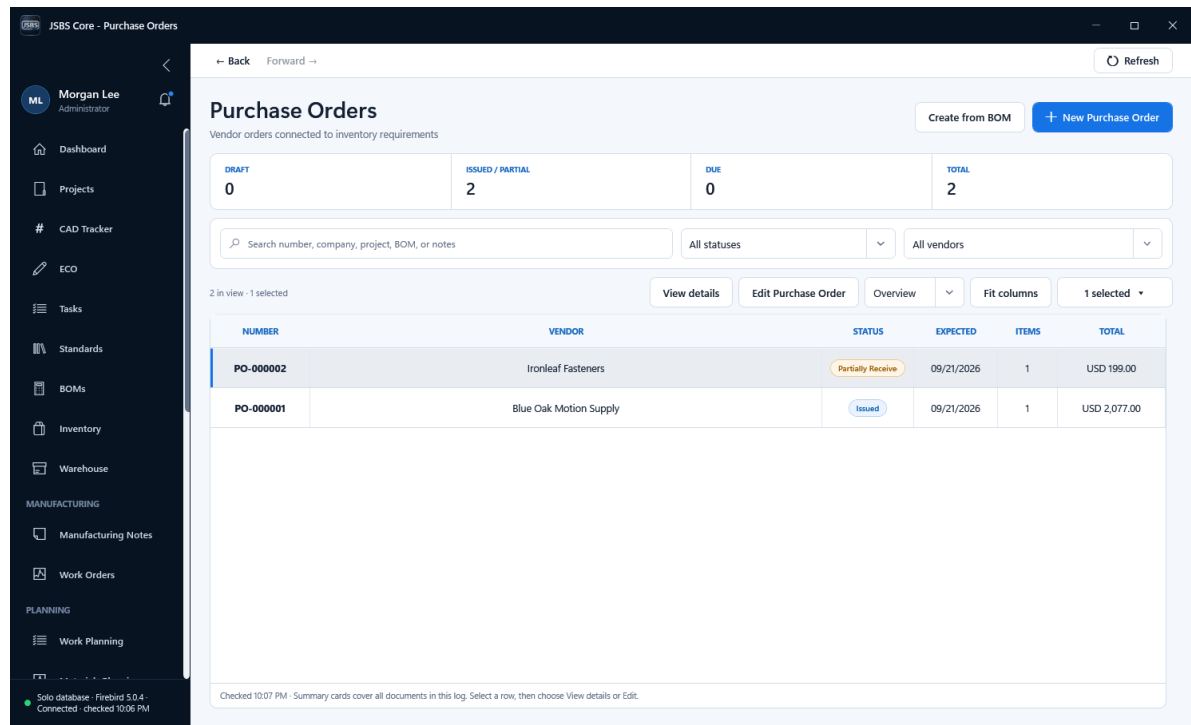


Figure 17.1. Purchase Orders register in the fictional workspace.

What to know before you start

- A Purchase Order is a purchasing commitment and can act as expected supply.
- Receiving requires an Inventory item and Warehouse destination.
- Partial receipts preserve remaining open quantity and history.
- RFQ/source links explain how the purchasing decision was reached.

PURCHASE ORDERS

17.1 Complete the core workflow

1. **Create from approved need.** Use a sourcing decision, RFQ response, or reviewed planning shortage.
2. **Add lines and dates.** Confirm item, quantity, unit, price, freight/tax, and expected delivery.
3. **Issue the PO.** Review branding, vendor address, terms, and totals before sending.
4. **Receive material.** Record actual quantity and correct receiving/storage location.
5. **Close remaining quantity deliberately.** Use partial/open/closed state based on what the vendor will still deliver.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

PURCHASE ORDERS

17.2 Connected work and record behavior

RFQs	Provide vendor pricing and lead-time evidence.
Inventory	Provides purchased item identity and planning policy.
Warehouse	Posts each receipt to a physical or operational location.
Materials Planning	Treats eligible open quantities as expected supply.
Vendors & Customers	Provides contacts, address, and terms.

Key fields and states

Open quantity	Ordered quantity not received or intentionally closed.
Expected date	Supply date used for follow-up and planning.
Partial receipt	Receipt smaller than ordered quantity; the remainder stays open.
Closed	No additional receipt is expected.

PURCHASE ORDERS

17.3 Practical reference

Recommended habits

- Receive what physically arrived, not the expected packing-list quantity.
- Use Receiving or Inspection locations when material must be verified.
- Review expected dates before receiving. Once a PO has posted Warehouse history, ordinary document editing is blocked; record a changed vendor promise in your follow-up process and review correction options with the administrator.

Troubleshooting

Receipt did not increase stock	Confirm posting, Inventory link, and active Warehouse location.
Expected supply missing	Review PO status, remaining quantity, identity, and expected date.
Wrong quantity received	Use a traceable reversal/correction instead of editing Warehouse history.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

18. Invoices

Create customer billing documents with customer, Project, commercial source, terms, line details and payment status. Billing does not post physical fulfillment.

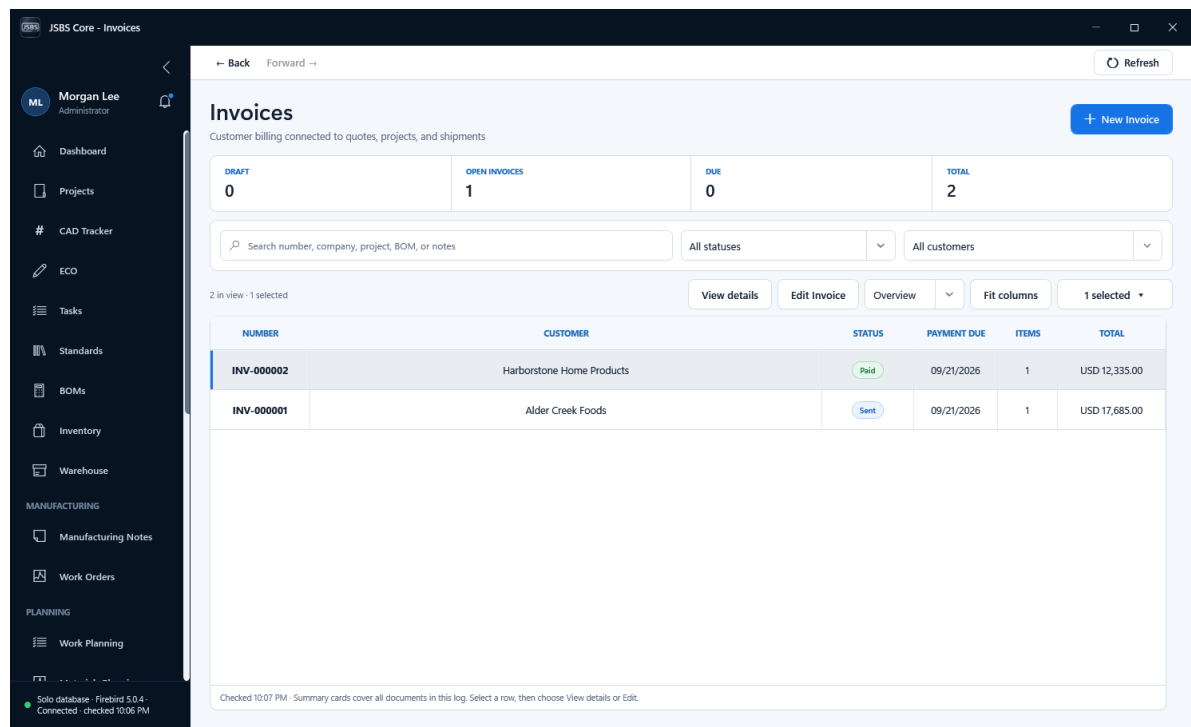


Figure 18.1. Invoices register in the fictional workspace.

What to know before you start

- An Invoice records billing; it is not a Warehouse shipment.
- Customer-facing PDFs use configured company branding, not JSBS Core branding.
- Project and supported commercial-document source links preserve context. Direct Sales Order-to-Invoice conversion is not available.
- Payment status follows the organization's accounting process.

INVOICES

18.1 Complete the core workflow

1. **Choose customer and source.** Set the customer and Project, and retain the supported commercial source when continuing an existing document. Review billable scope against the order separately.
2. **Create the header.** Set invoice date, due date, terms, reference, currency, and billing address.
3. **Add billable lines.** Confirm description, quantity, price, tax, discounts, and totals.
4. **Review the PDF.** Verify branding, addresses, totals, dates, and customer reference.
5. **Issue and maintain status.** Record sent, paid, partial, void, or other configured status according to policy.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

INVOICES

18.2 Connected work and record behavior

Sales Orders	Review customer demand and delivered scope alongside the Invoice; a direct billing conversion is not available.
Projects	Provide Project code and delivery context.
Vendors & Customers	Provide customer identity, addresses, contacts, and terms.
Packing Slips	Provide physical shipment evidence; Invoice remains separate.
Settings	Controls company branding and commercial defaults.

Key fields and states

Draft	Billing document is not yet issued.
Issued	Shared with the customer according to company process.
Paid/Partially paid	Reflects recorded payment state.
Void	Preserved but not collectible; do not delete issued history.

INVOICES

18.3 Practical reference

Recommended habits

- Match billing to the actual milestone and contract terms.
- Preview before issuing; wrong address or reference still creates friction.
- Use void/correction practices instead of deleting issued history.

Troubleshooting

Wrong branding	Review company branding and regenerate the customer-facing PDF.
Shipment quantity differs	Compare Packing Slip/Sales Order; billing and physical movement are separate.
PDF saved unexpectedly	Check the current user's personal output location.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

19. Packing Slips

Document actual customer shipments from Sales Orders, select quantities and addresses, and connect the document to Warehouse pick/shipment history.

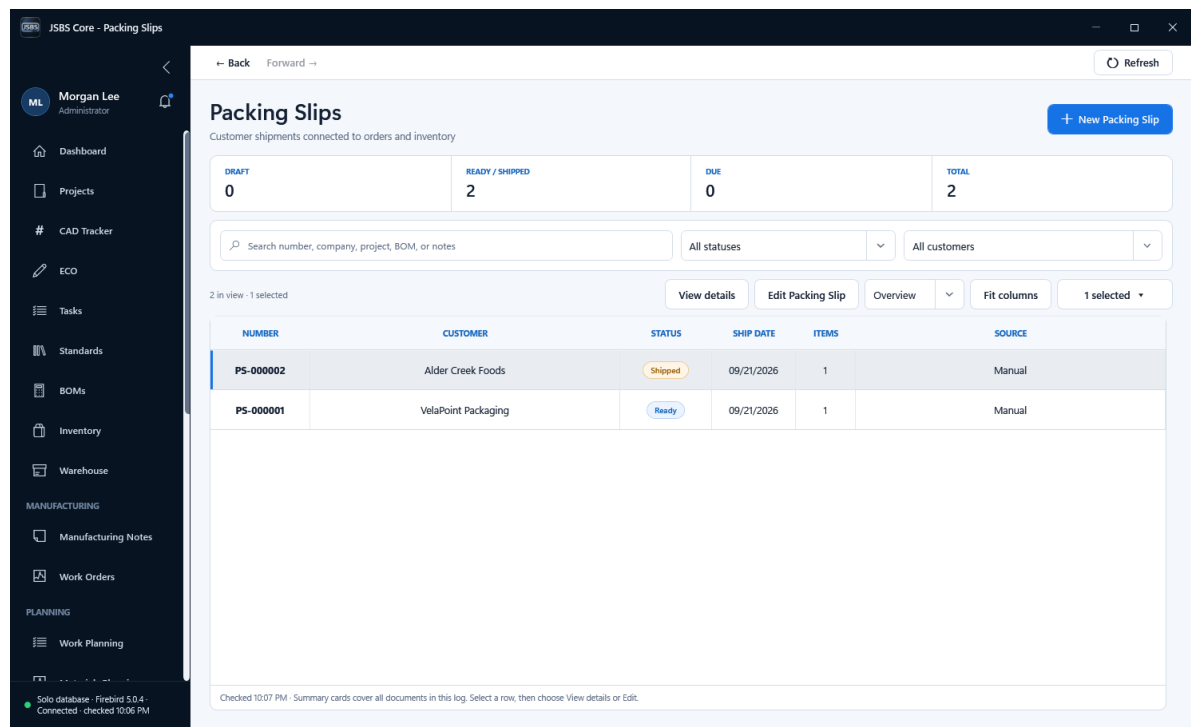


Figure 19.1. Packing Slips register in the fictional workspace.

What to know before you start

- A Packing Slip represents physical shipment, not billing.
- Shipment quantities should match what actually leaves the facility.
- Warehouse shipment history preserves stock movement.
- Customer-facing output uses configured company branding.

PACKING SLIPS

19.1 Complete the core workflow

1. **Choose the Sales Order.** Confirm customer, ship-to address, open quantity, and reference.
2. **Select shipment lines.** Enter actual quantity, packages, carrier/tracking, ship date, and notes.
3. **Verify Warehouse readiness.** Confirm picked/available stock and shipping location.
4. **Post the shipment.** Create the connected Warehouse event through the application workflow.
5. **Review and share the PDF.** Check address, quantities, packages, and references.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

PACKING SLIPS

19.2 Connected work and record behavior

Sales Orders	Provide customer, ordered lines, open quantity, and source reference.
Warehouse	Provides picked stock and immutable shipment movement.
Inventory	Provides item identity and quantity roll-up.
Invoices	Can bill the shipment but does not replace it.

Key fields and states

Ship date	When goods physically leave the organization.
Shipped quantity	Actual quantity on this shipment, not original order quantity.
Carrier/tracking	Operational reference used to follow the shipment.
Remaining quantity	Open Sales Order quantity after prior shipments.

PACKING SLIPS

19.3 Practical reference

Recommended habits

- Use partial Packing Slips for partial shipments.
- Confirm ship-to details before posting Warehouse movement.
- Keep tracking information with the Packing Slip.

Troubleshooting

Cannot ship quantity	Check remaining order quantity, available stock, allocations, and prior shipments.
Stock did not decrease	Confirm shipment movement posted from the correct location.
Customer address wrong	Correct partner/order address before regenerating the PDF.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

20. Vendors & Customers

Maintain the shared business-partner directory for commercial documents, sourcing, addresses, contacts, terms, tax/shipping context, and active/inactive state.

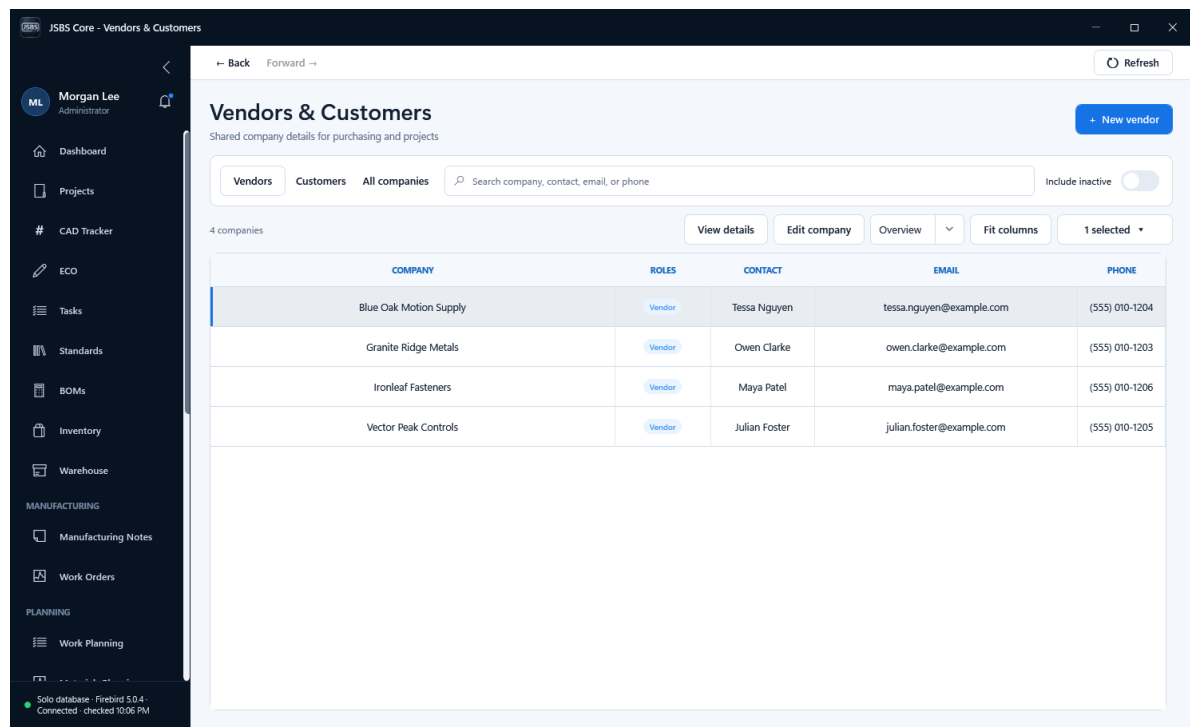


Figure 20.1. Vendors & Customers directory with fictional companies, types, contacts, and status.

What to know before you start

- One directory supports vendors, customers, or a partner serving both roles.
- Commercial documents reuse identities instead of copying uncontrolled names.
- Addresses, contacts, and terms should be reviewed before issuing a document.
- Deactivate obsolete partners to preserve document history.

VENDORS & CUSTOMERS

20.1 Complete the core workflow

1. **Create the partner.** Choose vendor, customer, or both and enter legal/display name.
2. **Add contacts and addresses.** Maintain billing, shipping, purchasing, sales, email, and phone details.
3. **Set commercial defaults.** Record terms, tax/shipping context, currency, and notes.
4. **Use the partner in documents.** Select the same identity in RFQs, Quotes, Orders, Invoices, and Packing Slips.
5. **Maintain status.** Update changed details and deactivate records that should no longer be selected.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

VENDORS & CUSTOMERS

20.2 Connected work and record behavior

RFQs and Purchase Orders	Use vendor contacts, address, and terms.
Quotes, Sales Orders, Invoices, Packing Slips	Use customer contacts, addresses, and terms.
BOMs and Inventory	Can reference preferred vendors and sourcing context.
Search	Find partners and related documents from one workspace.

Key fields and states

Partner type	Vendor, customer, or both.
Billing address	Used for customer financial documents.
Shipping address	Used for deliveries and Packing Slips.
Active	Controls normal selection while preserving historical links.

VENDORS & CUSTOMERS

20.3 Practical reference

Recommended habits

- Search before creating to avoid duplicates and split history.
- Use consistent capitalization and address formatting.
- Verify contacts when a document is time-sensitive.

Troubleshooting

Duplicate partner	Choose the authoritative record and deactivate the duplicate after reviewing links.
Partner not selectable	Confirm role and active state match the document.
Document shows old details	Existing documents may preserve captured values; update future defaults and the draft as appropriate.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

21. Global Search

Find records across the application by number, title, description, person, Project, partner, and other context while respecting module permissions.

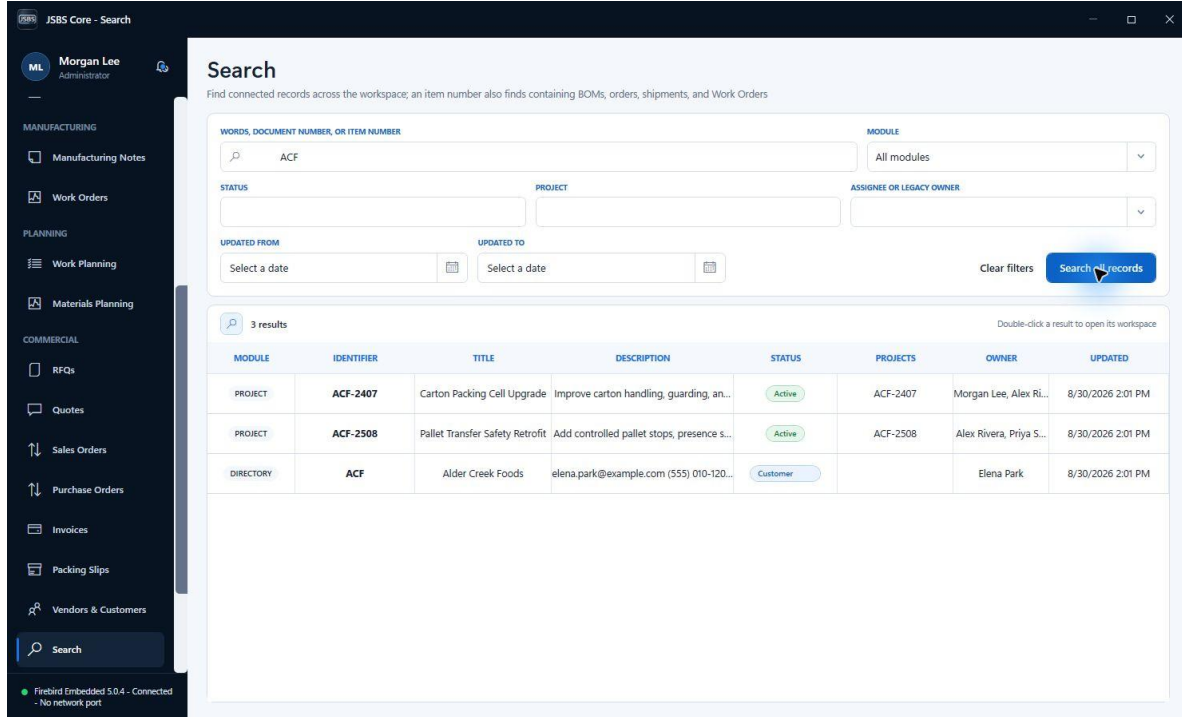


Figure 21.1. Global Search results spanning fictional engineering, planning, Inventory, and commercial records.

What to know before you start

- Search spans modules but never reveals one the user cannot read.
- User/assignee terms can find work relevant to a person.
- Results open the owning module; Search is not a separate data copy.
- Specific identifiers usually work better than broad descriptions.

GLOBAL SEARCH

21.1 Complete the core workflow

1. **Enter a meaningful term.** Start with record number, Project code, CAD number, company, title, or user.
2. **Review type and context.** Use the module/type label and summary to distinguish similar records.
3. **Refine if needed.** Add another identifying word instead of scrolling unrelated results.
4. **Open the result.** Continue work in the owning module.
5. **Check permission when nothing appears.** Request access only when there is a business need.

PERMISSION Write access is required to create or change records; read access is sufficient to open and review them.

GLOBAL SEARCH

21.2 Connected work and record behavior

All modules	Search indexes customer-facing record information across the workspace.
Permissions	Module read access controls visibility and open behavior.
Assignments	User names and work context support person-focused retrieval.
Attachments	Open the source Standard or Note to view the actual supporting file.

Key fields and states

Exact number	Best for CAD, ECO, Task, BOM, Standard, or commercial records.
Project code	Finds the Project and related records carrying that context.
Person	Finds records whose assignment context includes that user.
Company	Finds partners and related commercial documents.

GLOBAL SEARCH

21.3 Practical reference

Recommended habits

- Use exact identifiers when copying from a drawing, traveler, email, or report.
- Use Work Planning—not Search—when the question is workload or due dates.
- Open the record before acting; the result summary is not complete state.

Troubleshooting

No results	Check spelling, shorten the term, and confirm module read permission.
Too many results	Add a distinctive term or use the owning module's filters.
Result will not open	Reopen Search/module; the record or session may have changed.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

22. Reports

Create polished shareable PDFs from live records for ECOs, Projects, BOMs, Warehouse on-hand, and the immutable Warehouse movement ledger.

What to know before you start

- Reports are generated from current Firebird records at creation time.
- Each Windows user chooses a personal report output folder.
- ECO, Project, and BOM reports require a selected record; Warehouse reports summarize operational data.
- Customer/vendor commercial PDFs use your company branding and are separate from internal reports.

REPORTS

22.1 Complete the core workflow

1. **Open Reports.** Choose ECO, Project, BOM, Warehouse On-Hand, or Warehouse Movement Ledger.
2. **Select the record.** Choose the ECO, Project, or BOM when required.
3. **Generate the PDF.** JSBS Core creates it in your personal report folder.
4. **Review the output.** Confirm scope, dates, revisions, and totals.
5. **Share according to policy.** Generated files exist outside the database once saved.

PERMISSION Reports read access is required. Generated files can be viewed by anyone with filesystem access, so share deliberately.

REPORTS

22.2 Connected work and record behavior

ECO report	Header, reason, release details, and affected CAD hierarchy.
Project report	Progress, delivery details, and linked engineering/manufacturing records.
BOM report	Pinned CAD revisions, quantities, purchasing status, and vendors.
Warehouse On-Hand	Item quantities by facility/location, allocated, and available stock.
Movement Ledger	Immutable receipts, moves, picks, shipments, production, counts, corrections, and reversals.

Key fields and states

Output location	A personal setting; changing it does not move old files.
Recent history	Convenient links to files created in the reporting workflow.
As-of time	Warehouse reports describe data available when generated.
PDF	A snapshot, not a live view that updates itself.

REPORTS

22.3 Practical reference

Recommended habits

- Regenerate after important record changes.
- Protect output folders containing customer, pricing, or controlled information.
- Check record number and revision before distribution.

Troubleshooting

Nothing generates	Select the required record and confirm folder permission.
File not where expected	Review personal report output in Data & Backups.
PDF contains old information	It is a prior snapshot; regenerate from current data.
WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.	

MODULE GUIDE

23. Settings

Control personal appearance and files plus administrator company defaults, module permissions, users, Standards sections, manufacturing behavior, branding, feedback, and updates.

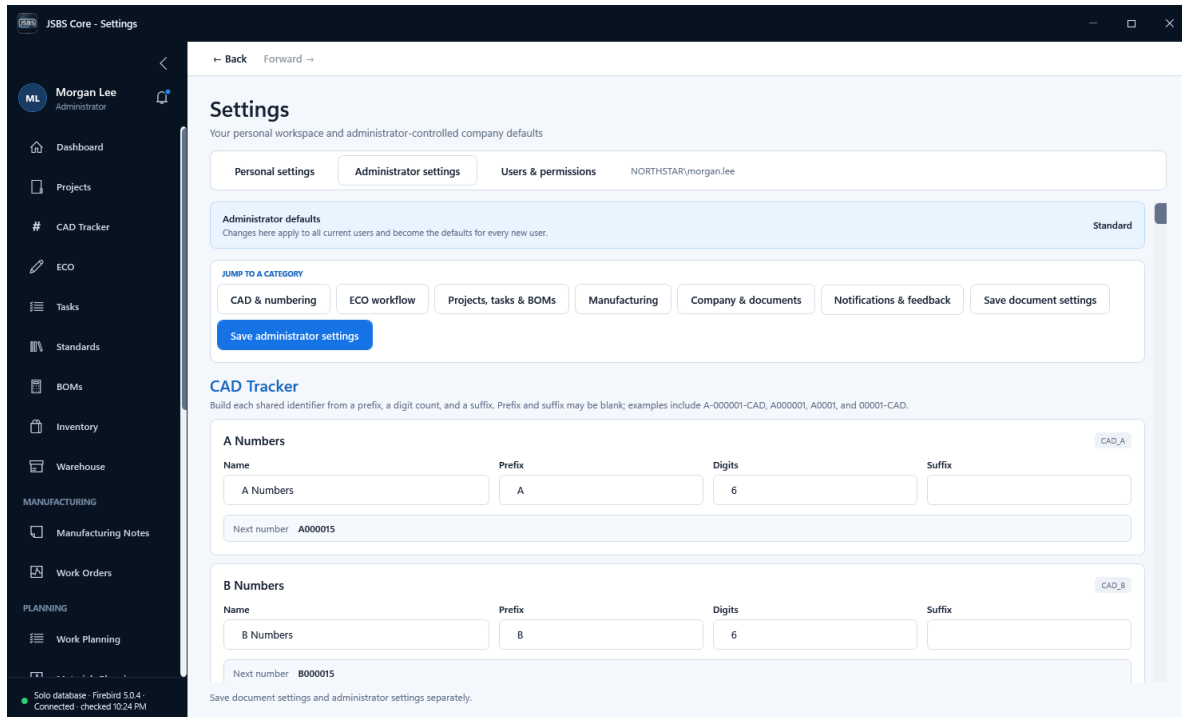


Figure 23.1. Administrator Settings showing company defaults and controlled behavior in the fictional workspace.

What to know before you start

- Personal settings follow the current Windows user; administrator settings affect the workspace.
- Administrators can turn modules on/off per user and separately grant view and write access.
- Standards sections and manufacturing workflow toggles are maintained centrally.
- Product feedback can include a screenshot; exclude passwords and sensitive customer information.

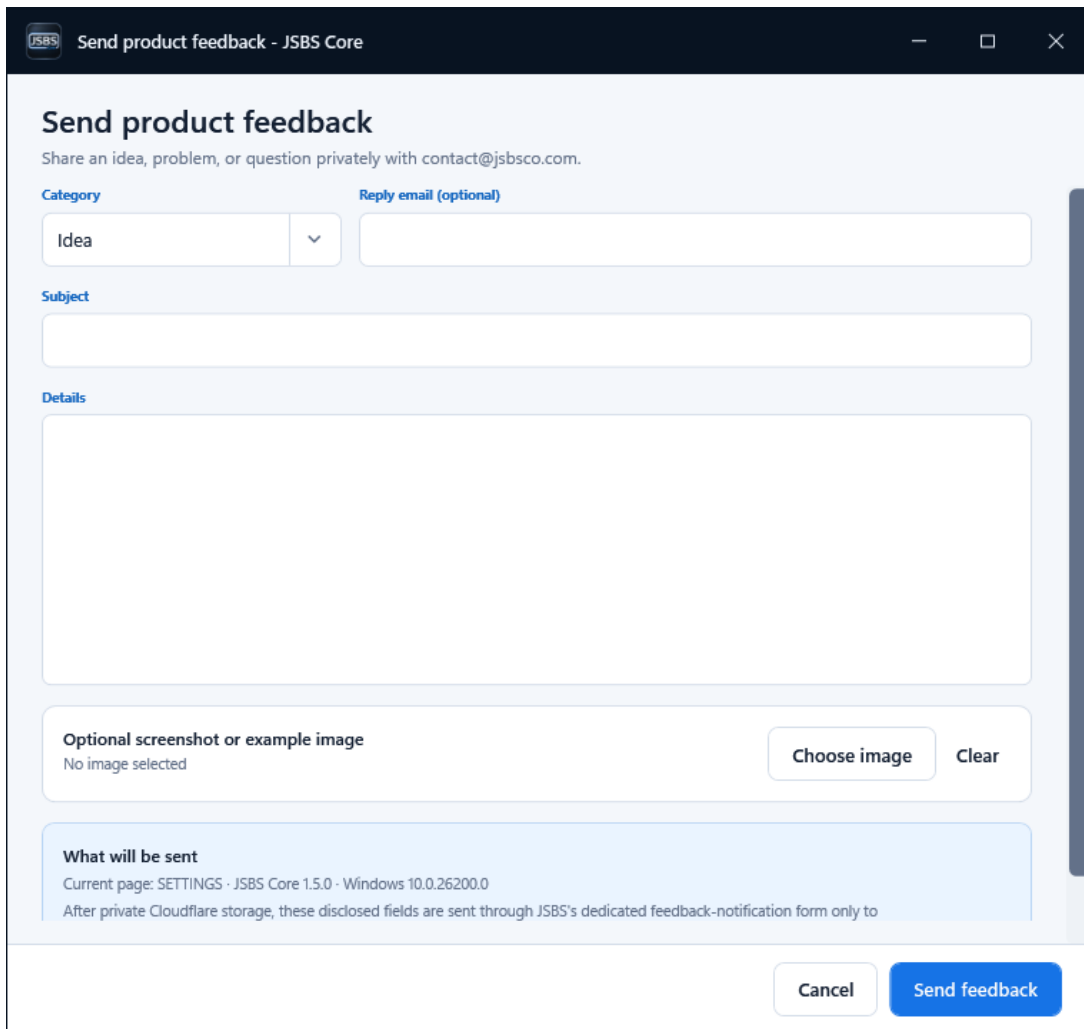
SETTINGS

23.1 Complete the core workflow

1. **Choose the correct area.** Use Personal for theme/output and Administrator for company-wide behavior.
2. **Review before changing.** Understand which users and workflows depend on the value.
3. **Change one logical area.** Update branding, options, sections, setup, or permissions deliberately.
4. **Save and verify.** Open the affected module as the intended user when practical.
5. **Communicate operational changes.** Tell users when renamed status, disabled module, or automation affects work.

PERMISSION Only administrators should change shared settings or user permissions. Personal settings affect the current Windows user unless stated otherwise.

Settings screen reference



The screenshot shows a web browser window titled "Send product feedback - JSBS Core". The form is titled "Send product feedback" and includes a subtext: "Share an idea, problem, or question privately with contact@jsbsco.com." The form is divided into several sections: "Category" with a dropdown menu showing "Idea" and a "Reply email (optional)" text input field; "Subject" with a text input field; "Details" with a large text area; "Optional screenshot or example image" with a "No image selected" message, a "Choose image" button, and a "Clear" button; and "What will be sent" with a light blue background, displaying "Current page: SETTINGS - JSBS Core 1.5.0 - Windows 10.0.26200.0" and a note: "After private Cloudflare storage, these disclosed fields are sent through JSBS's dedicated feedback-notification form only to". At the bottom right, there are "Cancel" and "Send feedback" buttons.

Figure 23.2. A closer view of the Settings workflow.

SETTINGS

23.2 Connected work and record behavior

Users & permissions	Maintains Windows identities, display names, active/admin state, and view/write rights.
Standards sections	Adds, renames, reorders, activates, or deactivates sections.
Manufacturing workflow	Separately controls CAD attention and ECO-release Note closure.
Company branding	Applies to customer/vendor commercial PDFs.
Feedback	Sends an idea, problem, or question with optional reply email and screenshot.

Key fields and states

View access	Allows the user to see and open the module.
Write access	Allows creates, edits, assignments, postings, and other changes.
Administrator	Broad workspace authority; protect administrator accounts.
Due-soon window	Controls how many days count as due soon for that user.

SETTINGS

23.3 Practical reference

Recommended habits

- Grant only access each user needs, then test the workflow.
- Keep company branding current before issuing customer documents.
- Check feedback screenshots for sensitive information before attaching.

Troubleshooting

Module disappeared	Review that user's module view switch.
User can view but not save	Write access is disabled or the record changed concurrently.
Feedback cannot send	Check internet, required fields, and image accessibility/size.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

MODULE GUIDE

24. Data & Backups

Protect the Firebird workspace, choose personal report output, coordinate Solo versus Team data responsibility, and restore only through verified procedures.

What to know before you start

- Solo uses an embedded local Firebird database; Team connects to a shared Firebird Server database.
- Verified Firebird backups are the supported protection format.
- Database reset is an administrator recovery action and requires a verified backup first.
- Team schema updates are installed separately from the desktop update and must be coordinated.

DATA & BACKUPS

24.1 Complete the core workflow

1. **Identify connection type.** Check the lower-left indicator and Data & Backups summary before maintenance.
2. **Choose a protected destination.** Use a location included in organizational backup and access control.
3. **Create a verified backup.** Allow completion and confirm the backup appears with size and date.
4. **Test recovery periodically.** Use controlled non-production recovery; a backup is trustworthy when restore is proven.
5. **Coordinate updates.** For Team, update server/schema first when release instructions require it.

PERMISSION Data & Backups should be restricted to people responsible for workspace protection. Reset and Team restore are administrator-controlled and disruptive.

DATA & BACKUPS

24.2 Connected work and record behavior

Solo database	Local and normally migrated safely when JSBS Core starts after an update.
Team database	Shared and maintained with the separate Database Installer/server tools.
Embedded attachments	Standards and Manufacturing Note files follow database backup/restore.
Commercial document library	Filesystem files that must be backed up separately.
Reports	Personal output files are outside the database and need separate retention.

Key fields and states

Verified backup	A supported Firebird backup created and checked through the workflow.
Restore	A controlled recovery action; never perform casually against a live Team database.
Schema version	Database structure required by a JSBS Core release.
Compatibility warning	Stops/warns users when desktop and Team database are not safe together.

DATA & BACKUPS

24.3 Practical reference

Recommended habits

- Schedule backups before upgrades and after important work.
- Keep more than one recovery point away from the same device failure.
- For Team updates, communicate a maintenance window so users stop writing.

Troubleshooting

Team compatibility warning	Stop and apply the matching Database Installer/schema update.
Backup folder unavailable	Choose an accessible protected destination; do not assume success.
Solo user updated Core	The embedded database migrates at startup; still keep a verified pre-update backup.

WHEN IN DOUBT Open the connected source record and verify status, identity, date, assignment, and permission before changing data to make a count or warning disappear.

CONNECTED WORKFLOW

Engineering feedback to released change

1. **Capture the observation.** Create a Manufacturing Note, link CAD and Project, and add safe supporting files.
2. **Make feedback visible.** If enabled, CAD shows a prominent attention state so users do not search every Note.
3. **Record disposition.** Decide whether no design change, clarification, or controlled change is required.
4. **Create or link the ECO.** Define affected CAD hierarchy and intended revision movement.
5. **Review and release.** Use the ECO process to authorize the change.
6. **Verify closure.** Confirm CAD and Manufacturing Note state follow the administrator's separate toggles.

IMPORTANT The CAD flag and ECO-driven Manufacturing Note closure are optional administrator settings. A Manufacturing Note never becomes engineering approval merely because it exists.

CONNECTED WORKFLOW

Customer order to shipment and invoice

Keep physical movement, customer demand, and billing as connected but distinct events. This prevents an issued Invoice from being mistaken for a shipment or a draft Quote from creating material demand.

Quote	Offer scope, quantity, price, terms, and validity.
Sales Order	Confirmed customer demand and delivery commitment.
Materials Planning	Checks dated demand against stock and expected supply.
Warehouse	Allocates, picks, and posts the physical shipment.
Packing Slip	Documents what actually shipped and where it went.
Invoice	Documents billing under the applicable commercial terms.

IMPORTANT Convert and link records instead of retyping them. Source traceability makes customer questions and corrections much easier to answer.

CONNECTED WORKFLOW

Shortage to purchase receipt

1. **Review the shortage.** Confirm demand, BOM, Inventory identity, policy, dates, on-hand, and existing supply.
2. **Request sourcing information.** Use an RFQ when price or lead time must be confirmed.
3. **Create the PO.** Turn the approved sourcing decision into a purchasing commitment.
4. **Track expected supply.** Keep promised dates and remaining quantity current.
5. **Receive what arrives.** Post actual quantity to the correct Warehouse location.
6. **Refresh the plan.** Receipt becomes on-hand; remaining PO quantity stays expected until closed.

IMPORTANT A Materials Planning suggestion is not a Purchase Order. The planner or buyer reviews the recommendation and creates the controlled purchasing record.

CONNECTED WORKFLOW

Work Order material and output

Demand	Output and BOM/routing define what must be made and which components are required.
Issue	Actual component quantity leaves the selected Warehouse location through a linked movement.
Execution	Operations and actual activity show manufacturing progress.
Output	Completed production enters an active Warehouse location through a linked movement.
Planning refresh	Issued components reduce on-hand; output becomes on-hand; remaining work may stay expected supply.

IMPORTANT Use Warehouse-linked issue and output actions so every quantity change has a time, user, reason, reference, and reversible ledger history.

CONNECTED WORKFLOW

Assignments from Project to sub-task

Project	May be unassigned or have one or several users.
Linked ECO/Task/Note	Uses combined linked Project teams by default.
Custom child team	Overrides inherited ownership when that one item needs different people.
Sub-task	Can be assigned inside the parent details view; only one child layer is allowed.
Dashboard	Shows effective assignees with due dates, priority, and status.
Assignment history	Preserves who changed ownership, when, and which members changed.

IMPORTANT Use inherited teams for normal Project work. Custom teams are valuable when responsibility truly differs, but unnecessary overrides make workload harder to understand.

ADMINISTRATION

Solo and Team responsibilities

A Solo user is normally safe to update Core because the embedded database is local and supported migration runs at startup. A Team environment must follow the release order when schema changes so an updated desktop does not write against an incompatible shared database.

Solo	One workspace user and an embedded local Firebird database. Core applies supported local schema migrations at startup.
Team	Multiple licensed users/devices connect to shared Firebird Server. Database maintenance is coordinated separately.
Core update	Updates the Windows application.
Database Installer update	Updates the maintenance utility. Server repair or schema changes start only when the administrator separately chooses Repair or update server.
Shared responsibility	Backups, permissions, maintenance windows, and user communication remain necessary in both editions.

ADMINISTRATION

Safe update checklist

1. **Read release instructions.** Identify whether the release changes only Core or also needs a Database Installer/schema update.
2. **Create and verify backup.** Protect the database and separately protect retained document/report folders.
3. **Coordinate server maintenance.** Have Team users save and close Core before a server repair or schema change. Core 1.6.0 requires schema 23. Maintain the server with Database Installer 1.9.0 before updating workstations. Replacing the installer executable alone does not upgrade the database.
4. **Update Team database first when required.** Use matching Database Installer instructions and verify success.
5. **Update Core workstations.** Install the approved desktop release.
6. **Run focused verification.** Connect, open key modules, and confirm paths and basic read/write behavior.

COMPATIBILITY WARNING If Core warns that the Team database is too old or otherwise incompatible, stop. Do not bypass the warning until the administrator completes the matching database update.

ADMINISTRATION

Backup and recovery checklist

- Create verified backups on a schedule appropriate to how much work the organization can afford to re-enter.
- Keep recovery copies outside the same device and failure domain as the live database.
- Protect backup access because the database can include commercial, engineering, user, and attachment information.
- Test restore in a controlled non-production environment and document the result.
- Back up the commercial document library and important generated reports separately; they are filesystem files.
- For Team, assign a named person and alternate who understand the Database Installer and Server Backup Tool procedures.

RESET IS NOT BACKUP Reset database is an administrator recovery action that creates a clean database after requiring a verified backup. It is not routine cleanup and does not replace restore testing.

ADMINISTRATION

Where documents and pictures live

Standards attachments	Stored in the Firebird database with the Standard. No section-specific shared folder is required.
Manufacturing Note attachments	Stored in the Firebird database with the Note. No Note-section shared folder is required.
Commercial documents	Stored in the configured shared document library or personal fallback when no shared library is configured.
Generated reports	Saved to each Windows user's personal report output folder.
Database backup	Includes database-stored attachments, but not separate filesystem document/report folders.

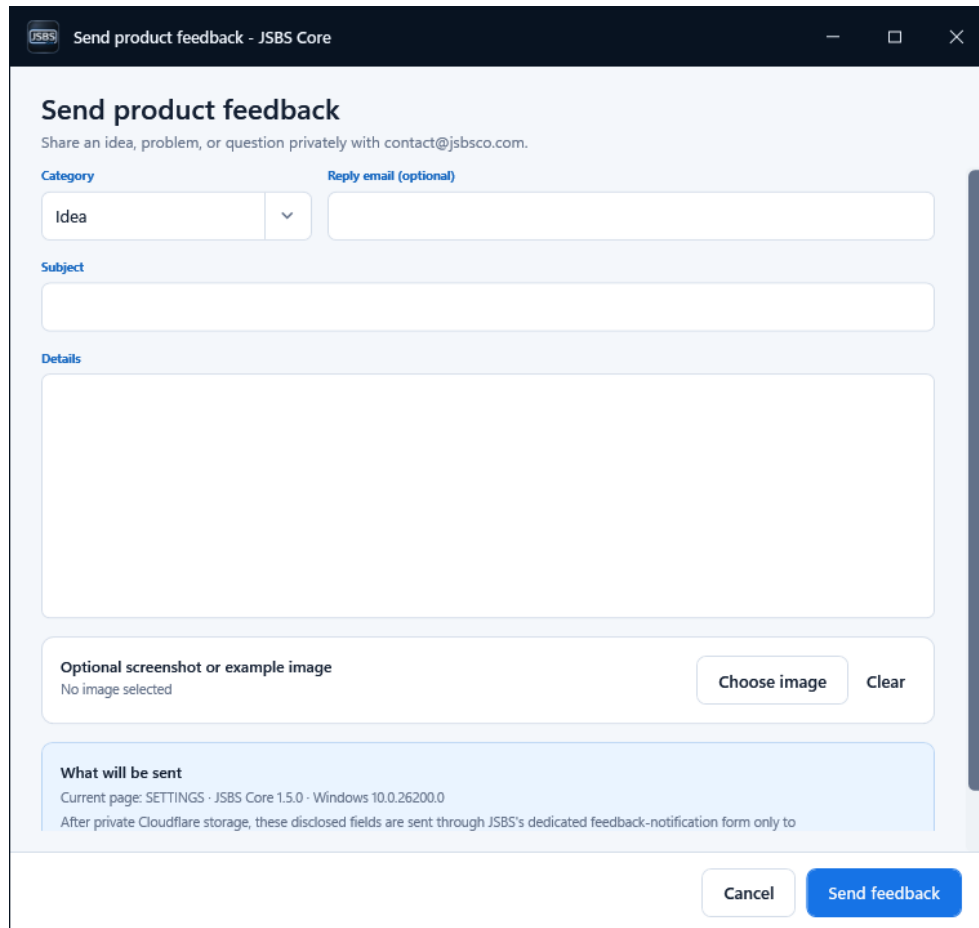
IMPORTANT A complete recovery plan protects both the Firebird database and any configured filesystem document libraries or report folders that the organization needs to retain.

SUPPORT

Send useful product feedback

Open Settings > Personal settings > Product feedback. Choose a category, add an optional reply email, describe the idea, problem, or question, and optionally attach one screenshot or example image.

- Explain what you expected, what happened, and the steps that led to it.
- Include the record number and current page when they are not confidential.
- Check screenshots for passwords, customer-sensitive details, proprietary drawings, or personal information.
- For urgent operational or security issues, use the support/escalation route supplied with the purchase; feedback is not an emergency channel.



Send product feedback
Share an idea, problem, or question privately with contact@jsbsco.com.

Category **Reply email (optional)**

Idea

Subject

Details

Optional screenshot or example image
No image selected

Choose image Clear

What will be sent
Current page: SETTINGS - JSBS Core 1.5.0 - Windows 10.0.26200.0
After private Cloudflare storage, these disclosed fields are sent through JSBS's dedicated feedback-notification form only to

Cancel Send feedback

Feedback form with category, optional reply email, details, and optional image.

TROUBLESHOOTING

Common workspace symptoms

A module is missing	Check that user's module view permission.
Save is unavailable	Check write permission, required fields, and workflow state.
A stale-write warning appears	Reload, compare the newer record, and reapply intentional edits.
Counts differ between users	Compare permissions, filters, selected user, Include closed/retired, and connection.
A linked record is missing	Confirm the real relationship was selected and the source remains visible.
Stock quantity is unexpected	Review balances, allocations, movements, corrections, and reversals.
A PDF looks old	Regenerate it from current records; PDFs do not update themselves.
Team compatibility warning	Stop and coordinate the matching Database Installer/schema update.

TROUBLESHOOTING

Before requesting help

1. **Record the exact message.** Copy the wording or take a safe screenshot.
2. **Identify page and record.** Include module and record number without unnecessary sensitive content.
3. **Check connection and permissions.** Confirm expected Solo/Team state and user rights.
4. **Repeat once carefully.** Note exact steps, but do not keep retrying a destructive or posting action.
5. **Check another safe record.** Determine whether the problem is record-specific or module-wide.
6. **Send the smallest useful evidence.** Use Product feedback or the supplied support route with reproducible steps.

DO NOT SEND Never include passwords, license keys, database credentials, private keys, unnecessary customer data, or proprietary files unrelated to the problem.

GLOSSARY

Glossary A–M

Allocated	Inventory quantity reserved for demand and not generally available for other work.
BOM	Bill of Materials; the controlled list of items and quantities for an assembly or deliverable.
CAD record	The stable identity for a drawing, model, assembly, or related engineering item.
Custom team	A team maintained directly on one work item instead of inherited from Projects.
ECO	Engineering Change Order; the controlled proposal, review, release, and record of a change.
Effective assignment	Users who own a record after inheritance/custom-team rules are applied.
Embedded database	The local Solo Firebird database used without a network server.
Leaf Task	A Task with no child; eligible leaf Tasks drive automatic Project progress.
Manufacturing Note	A controlled feedback record from manufacturing or related observation.
Materials Planning	The module that explodes demand, nets supply, and suggests buy/make/review actions.

GLOSSARY

Glossary N–Z

Net requirement	Remaining dated need after eligible on-hand and expected supply.
Pinned revision	The CAD revision intentionally preserved on a BOM line.
Project team	One or more users assigned to a Project; linked work normally inherits them.
Reversal	A new Warehouse movement that offsets a prior movement while preserving history.
Safety stock	A planning-policy buffer considered when evaluating shortages.
Schema	The database structure version required by a Core release.
Solo	Single-workspace-user edition using an embedded local database.
Stale write	A save based on an older record after someone else saved a newer version.
Team	Shared Firebird Server workspace with multi-user administration.
Verified backup	A supported Firebird backup created and checked through the workflow.
Work Order	Manufacturing record for output, routing, material issue, execution, and finished output.

REFERENCE

Screenshot index

The guide uses the following screenshot subjects from the isolated fictional workspace. Labels and counts in a customer's workspace will differ.

Dashboard	Dashboard Overview, Dashboard User Workload, Notifications Light
Projects	Projects Register, Projects Preview
CAD Tracker	Cad Tracker Register, Cad Tracker Mfg Feedback
Engineering Change Orders	Eco Register, Eco Details, Eco Worksheet
Tasks and Sub-tasks	Tasks Subtasks, Tasks Board
Bills of Materials	Boms Register, Boms Details, Boms Editor
Standards	Standards Register, Standards Details, Standards Editor
Inventory	Inventory Register, Inventory Editor
Warehouse	Warehouse Overview, Warehouse Map, Warehouse Counts History
Manufacturing Notes	Manufacturing Notes Register, Manufacturing Note Editor, Manufacturing Note Decision
Work Orders	Work Orders Register, Work Order Editor
Work Planning	Work Planning Register

Screenshot index continued

Materials Planning	Materials Planning, Materials Demand
RFQs	Rfqs Register
Quotes	Quotes Register
Sales Orders	Sales Orders Register
Purchase Orders	Purchase Orders Register
Invoices	Invoices Register
Packing Slips	Packing Slips Register
Vendors & Customers	Vendors Customers
Global Search	Search Results
Settings	Settings Administrator, Feedback Dialog

DOCUMENT CONTROL

Guide information

Product	JSBS Core
Guide edition	Complete Customer Guide
Product version	1.6.0 published release
Database compatibility	Schema 23; Database Installer 1.9.0. Maintain the Team server before updating Core clients. Updating only the installer executable does not migrate the database.
Prepared by	JS Business & Services, DBA JSBS Co.
Screenshot data	Fictional training workspace; no real customer, employer, or production data.
Format	Editable Microsoft Word document and distribution PDF.

Product behavior can change in later releases. Review the release instructions supplied with an update and revise local training copies when screens or workflow rules change.