

Review, and if necessary, Revise Preloaded Stations

What's the purpose of this setup step?

In the prior step, you learned a little about the purpose and use of stations. In this step you will:

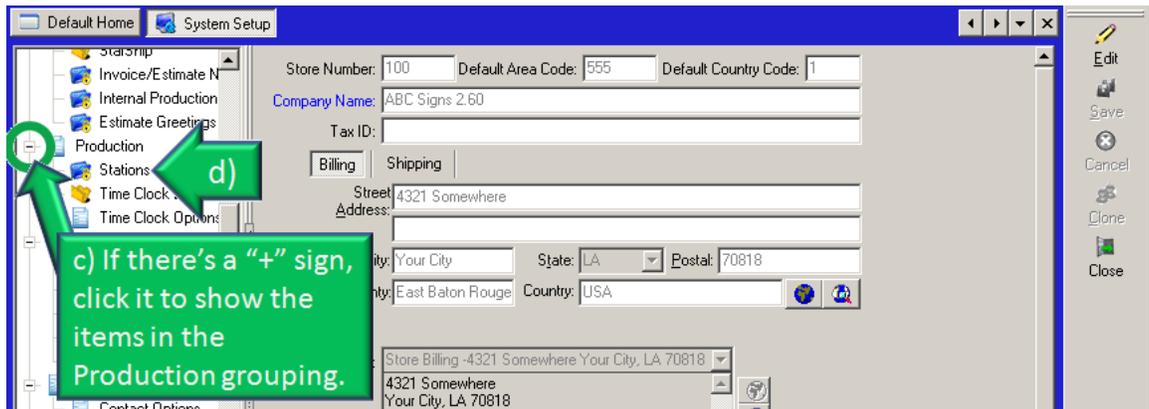
- A. Learn about the specific settings for Stations.
- B. Deactivate the pre-loaded stations that you do NOT want to use.
- C. Revise the settings for stations you want to use.
- D. Add new stations.
- E. Reorder the stations to your liking.

A. Learn about the specific settings for Stations.

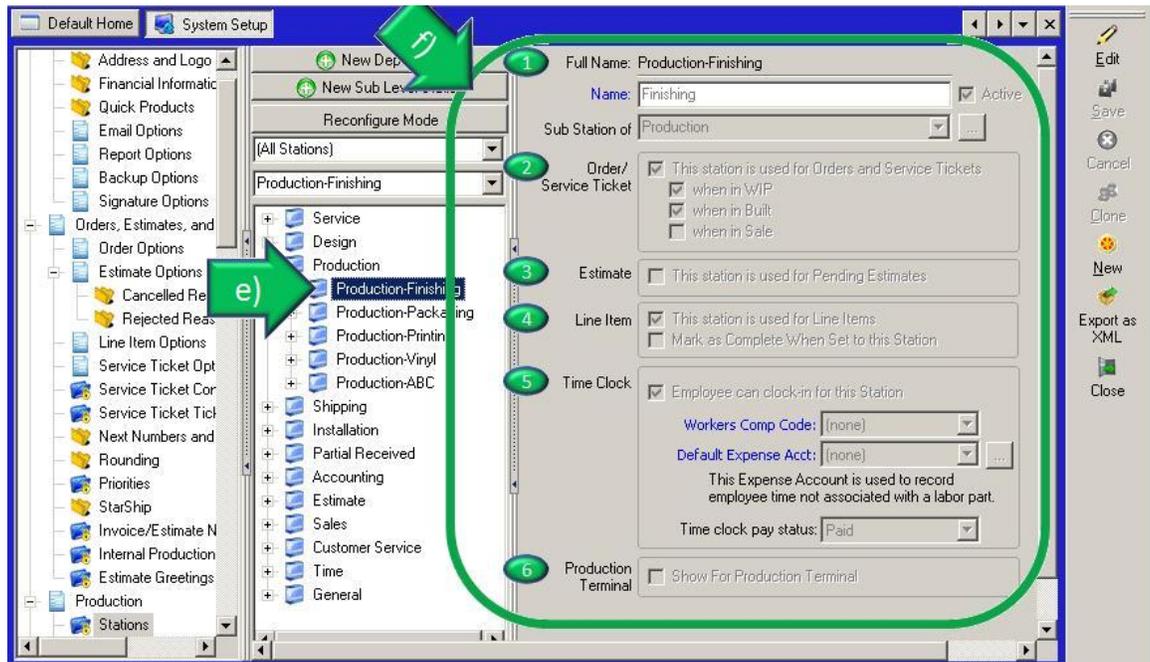
- 1) Let's go to the screen that has the settings for Stations:
 - a) Click **Setup**.
 - b) Click **System Setup**.



- c) In the list on the left, scroll down until you see **Production**. If there's a "+" symbol next to **Production**, click the "+" symbol.
 - d) You'll see **Stations**, a sub item under **Production**. Click on **Stations**.



- e) Click on a station in the center column. To expand the list of stations, click on the “+” signs. (Note that the terms “Department” and “Sublevel Station” are used to convey a hierarchy. There is no other difference.)
- f) Let’s review the possible settings for a station:

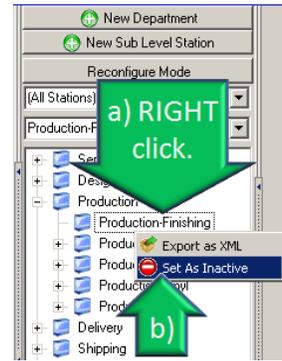


1. Names: Notice the Full Name is a combination of the Name and the higher level station. This makes it easy for the user to understand that Finishing is within the Production group of stations. It also makes it possible to search for all stations under Production and to setup up Dashboards to monitor all stations and work under that Department.
 - Name: This field is directly editable. Users typically use the name of the different areas in the business where work gets done.
 - Sub Station of: This shows the group that the station is under.
2. Order/Service Ticket: Check the first box if you intend to use this station for tracking orders or service tickets in your business. Many stations are only appropriate while an order or service ticket is in a particular status.
 - When in WIP: WIP stands for Work-in-Process, which means the order is in production or is in the process of being serviced. If it’s appropriate to have this station used to track orders in WIP, check this box.
 - When in Built: Built is Cyrius’ term for an order that has completed fabrication but has not been transferred to the customer (picked-up, delivered or installed). From an accounting point of view, it CANNOT be counted as a “sale” yet. If it’s appropriate to have this station used to track orders in Built, check this box.
 - When in Sale: Sale is Cyrius’ term for an order that has been picked-up, delivered or installed so it CAN be counted as a “sale.” If it’s appropriate to have this station used to track orders in Sale, check this box.

3. Estimates: Sales and marketing oriented users often use stations to track their pending estimates. This enables the user to be more efficient and effective in working to close open estimates.
4. Line Item: Many businesses need to track each line item separately as it routes through production. Check this box to designate that this station is appropriate for routing individual line items.
 - Mark as Complete when Set to this Station: In addition to stations, line items can be marked "Complete" as well. If you wish to have line items automatically marked "Complete" when they are moved into this station, check this box. This is most commonly used for Quality Control or Shipping stations.
5. Time Clock: Control enables you to have employees clock in at stations making it easy to track the time spent there.
 - Workers Comp Code: What is the workers comp code for this station? By tracking this you can gain a more accurate accounting of an employee's time in various stations, which may have very different workers comp codes. This may help to reduce your workers comp liability. **(This requires the Payroll Module.)**
 - Default Expense Account: If an employee is not clocked into an order (or a part on that order) and you are using the payroll module, this GL Account is used to expense their wages. **(This requires the Payroll Module.)**
 - Time Clock Pay Status: Does an employee get paid when he/she is clocked into this station? Some stations, such as lunch and vacation, are used for tracking employees' whereabouts but are not actually paid time.
6. Production Terminal: Production Terminal ("PT") is an additional module that Cyrious sells for Control. PT makes it fast and easy for production users to log into control and see the production related info for an order and to clock in and out of jobs. Check this box if you have PT and want this station to be visible in PT.

B. Deactivate the pre-loaded stations that you do NOT want to use.

- 1) The fastest way to deactivate a station is to:
 - a. Right click on it.
 - b. Click **Set As Inactive**.
 - c. If you are setting Inactive a station with sub-stations, you will be notified that it will deactivate all sub-stations as well. When the message pops up, click **Yes**.
 - d. Now that station has been deactivated. Repeat these steps until you've finished deactivating the stations you don't want to use.



C. Revise the settings for stations you want to use.

- 1) To revise the settings for a station, follow these simple steps:
 - a. Click on the station that you want to edit.
 - b. Click **Edit**.
 - c. Change the settings.
 - d. Click **Save**. Repeat for the other stations that you want to edit.

D. Add new stations.

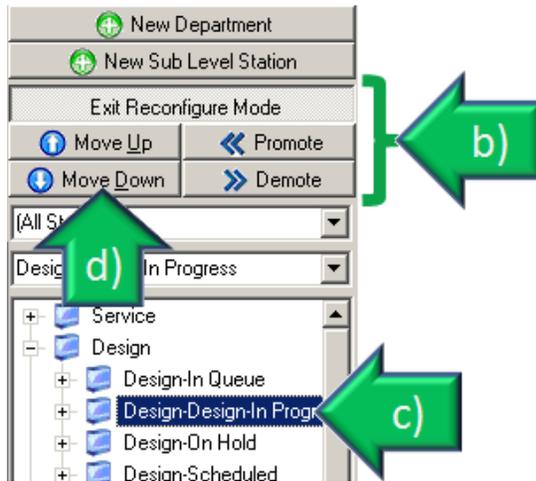
- 1) If you would like to add a new Station:
 - a) Click the **Station** where you want to put it.
 - b) Click **New Sub Level Station**.
 - c) Type in a **Name** for your station.
 - d) Choose options applicable to this station.
 - e) Click **Save**.
 - f) Repeat for the other new stations that you'd like to add. You can add new Departments in a similar fashion.

E. Reorder the stations to your liking.

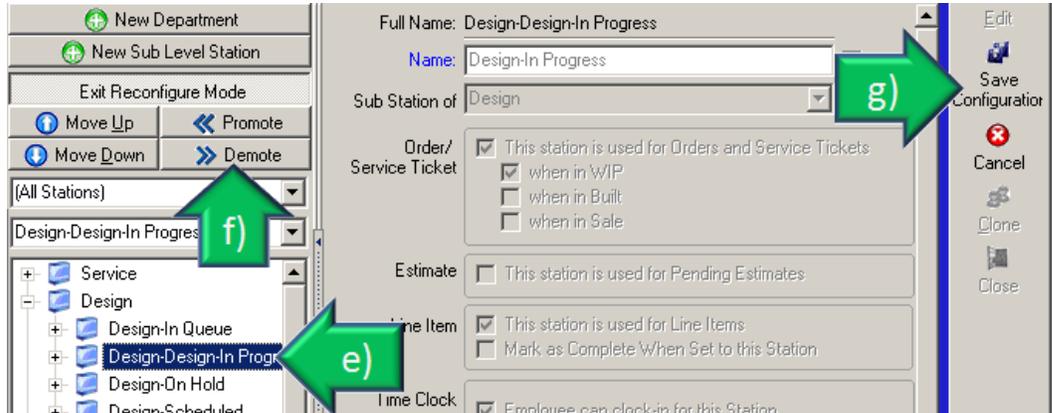
- 1) If you want to change the order of the stations so they match your business better, here are some of the tools available:
 - a) Click **Reconfigure Mode**.



- b) Now 4 new buttons have appeared that will let you move stations up or down, or promote or demote them.
- c) To move a station, simply click on the station.
- d) Click the **Up** or **Down** buttons.



- e) To promote or demote a station or department, click on the station or department.
- f) Then click either the **Promote** or **Demote** button.
- g) Once you're finished rearranging the list of stations, click the **Save Reconfiguration** button. Now you've successfully re-ordered your station list.



Now your stations are set up and ready to use! You're close to being able to use Control in your business.