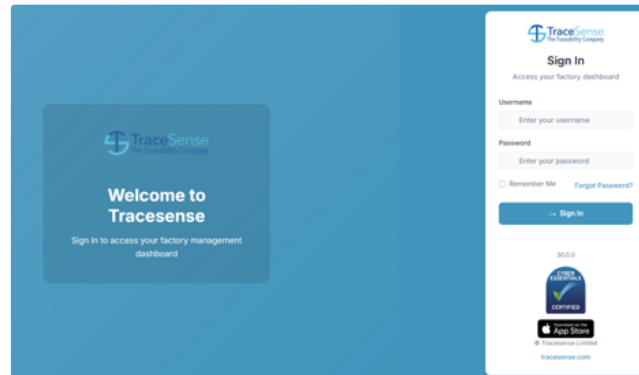


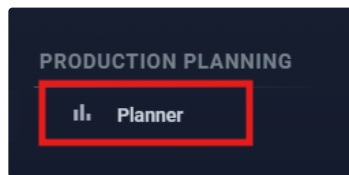
TRACESENSE PLANNING MODULE GUIDE

Within this guide we will look at the features of the planning module and how it all works.

First you will need to login to your Tracesense Portal



Once logged in find the Production Planning section on the side menu and select Planner



Now from this page you can Add a new production plan, View or Amend current plans

Name	Start Date	End Date	Type	Description	Actions
TEST EXAMPLE 1 - WEEK 1	01-02-2026	06-02-2026	custom	EXAMPLE PLAN FOR GUIDE 1	Update Products Delete
TEST EXAMPLE 2 - WEEK 2	08-02-2026	13-02-2026	custom	EXAMPLE PLAN FOR GUIDE 2	Update Products Delete
TEST EXAMPLE 3 - WEEK 3	15-02-2026	20-02-2026	custom	EXAMPLE PLAN FOR GUIDE 3	Update Products Delete

[Adding a Production Plan](#)

[Adding Products to a Production Plan](#)

[Releasing a Product for Scheduling](#)

[Scheduling a Mix Only](#)

[Amending a Production Plans Details](#)

[Amending a Production Plans Products](#)

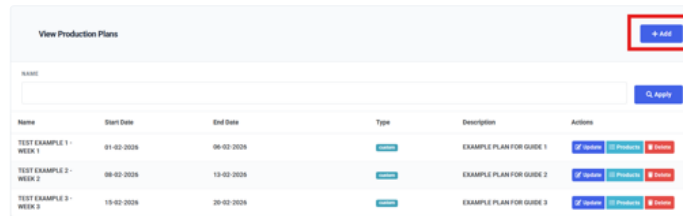
[Viewing Production Plan Material Requirements](#)

[Viewing Entire Plans Material Requirements](#)

[Viewing Material Requirements for and individual Production Requirement](#)

Adding a Production Plan

To add a new production plan, select the blue 'Add' button from the top of the production planning page on the portal



Name	Start Date	End Date	Type	Description	Actions
TEST EXAMPLE 1 - WEEK 1	01-02-2026	06-02-2026	Weekly	EXAMPLE PLAN FOR GUIDE 1	View Refresh Delete
TEST EXAMPLE 2 - WEEK 2	08-02-2026	13-02-2026	Weekly	EXAMPLE PLAN FOR GUIDE 2	View Refresh Delete
TEST EXAMPLE 3 - WEEK 3	15-02-2026	20-02-2026	Weekly	EXAMPLE PLAN FOR GUIDE 3	View Refresh Delete

Now give the plan a name, Start and End date, select the plan type from: Monthly, Quarterly, Annual, Custom, Daily, Weekly. You can also add a description for the plan.

Production Plan

Name:

Enter the name of the production plan

Start Date:

Enter the start date of the production plan

End Date:

Enter the end date of the production plan

Plan Type:

Select the plan type

Description:

Enter the description of the production plan

[Save](#)

Once you fill in all the details hit 'Save'

Quantity Required

Schedule Date

Lead Time Days - expected time to complete, in days

Projected Completion Date

Priority (lower=higher priority)

Recipe:

Select the recipe

Line:

Quantity Required:

Enter the quantity required

Scheduled Date:

Enter the scheduled date

Lead Time Days:

Enter the lead time days

Projected Completion Date:

Enter the projected completion date

Priority:

Priority sequence number for scheduling (lower = higher priority)

Once you have filled in all the details, hit 'Save'

Recipe:

 Select the recipe

Line:

Quantity Required:

 Enter the quantity required

Scheduled Date:

 Enter the scheduled date

Lead Time Days:

 Enter the lead time days

Projected Completion Date:

 Enter the projected completion date

Priority:

Default business number for scheduling (lower = higher priority)

You have now added a product to the production plan

Releasing a Product for Scheduling

Once you are ready to release a product you have planned, you will first need to select to schedule it and then mark it as released. This is done on the the 'View Proposed Products' page from within the relevant production plan.

Select the product you are scheduling by select the check box next to the product and then select the 'Schedule Requirement' button

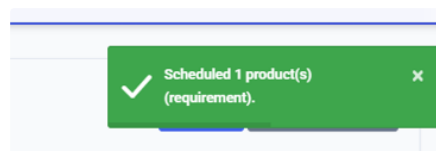
View Proposed Products ← Back to Plans

RECIPE:

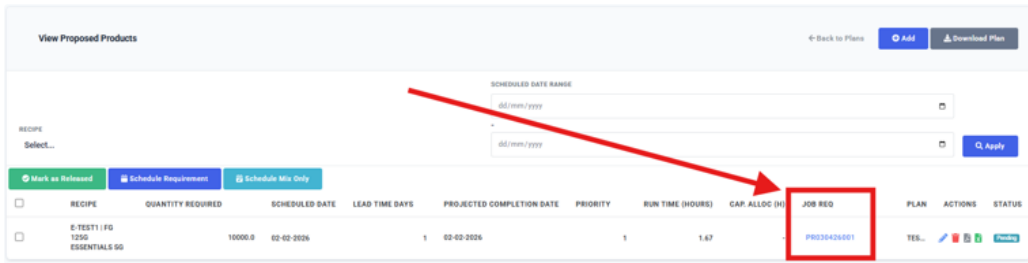
SCHEDULED DATE RANGE

<input type="checkbox"/>	RECIPE	QUANTITY REQUIRED	SCHEDULED DATE	LEAD TIME DAYS	PROJECTED COMPLETION DATE	PRIORITY	RUN TIME (HOURS)	CAP. ALLOC (D)	JOB REQ	PLAN	ACTIONS	STATUS
<input checked="" type="checkbox"/>	E-TEST1 FG 125G ESSENTIALS SG	10000.0	02-02-2026	1	02-02-2026	1	1.67	-	-	TES...	<input type="button" value="Schedule"/> <input type="button" value="Release"/>	

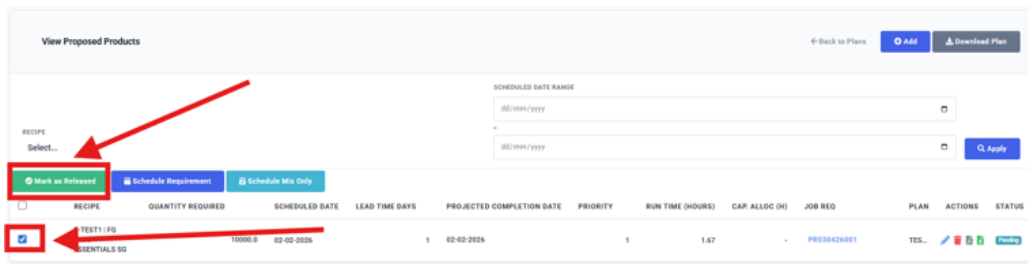
A pop up will appear in the top right confirming the product has been scheduled



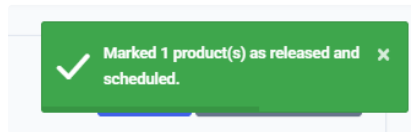
The 'Proposed Products' page will now update to show the Production Job Number for the requirement



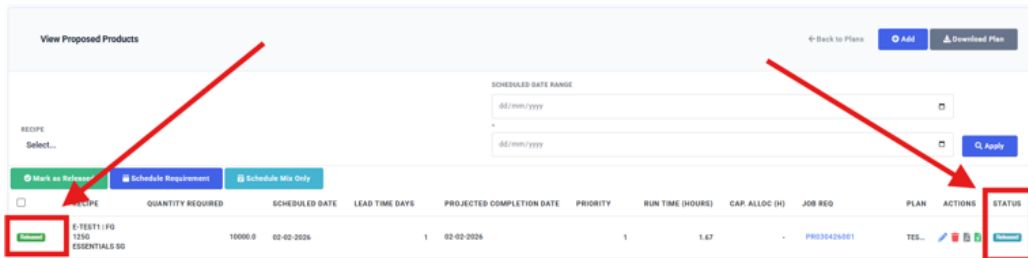
Now mark the product as released by selecting the check box next to the product and then select the 'Mark as Released' button



A pop up will appear in the top right confirming the product has been marked as released

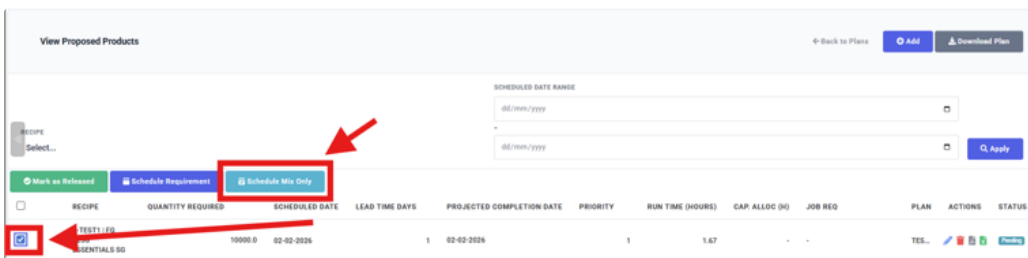


The 'Proposed Products' page will now update to show the product has been released



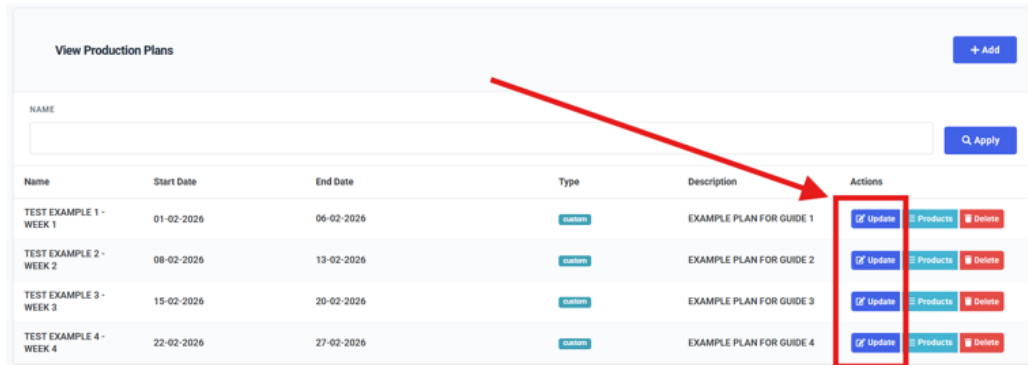
Scheduling a Mix Only

To only schedule the mix required for a product select the product with the check box and then select 'Schedule Mix Only' button



Amending a Production Plans Details

To Edit the details of a plan, from the Planner section of the portal select 'Update' next to the plan which details you wish to amend

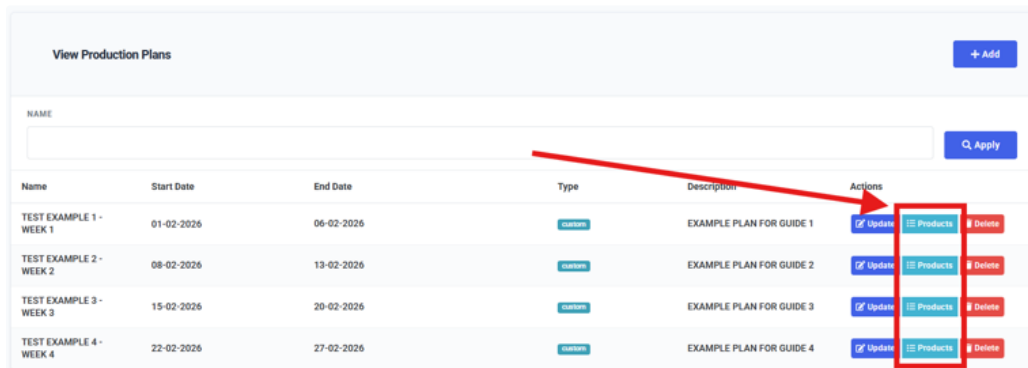


The screenshot shows the 'View Production Plans' interface. At the top, there is a search bar labeled 'NAME' and a '+ Add' button. Below the search bar is a table with the following columns: Name, Start Date, End Date, Type, Description, and Actions. The table contains four rows of example plans. A red arrow points to the 'Update' button in the 'Actions' column of the first row.

Name	Start Date	End Date	Type	Description	Actions
TEST EXAMPLE 1 - WEEK 1	01-02-2026	06-02-2026	custom	EXAMPLE PLAN FOR GUIDE 1	[Update] [Products] [Delete]
TEST EXAMPLE 2 - WEEK 2	08-02-2026	13-02-2026	custom	EXAMPLE PLAN FOR GUIDE 2	[Update] [Products] [Delete]
TEST EXAMPLE 3 - WEEK 3	15-02-2026	20-02-2026	custom	EXAMPLE PLAN FOR GUIDE 3	[Update] [Products] [Delete]
TEST EXAMPLE 4 - WEEK 4	22-02-2026	27-02-2026	custom	EXAMPLE PLAN FOR GUIDE 4	[Update] [Products] [Delete]

Amending a Production Plans Products

To amend Products on a production plan, from the Planner section on the portal select the 'Products' button

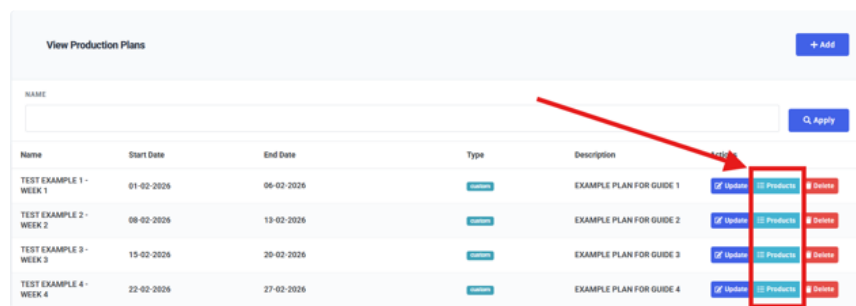


The screenshot shows the 'View Production Plans' interface. At the top, there is a search bar labeled 'NAME' and a '+ Add' button. Below the search bar is a table with the following columns: Name, Start Date, End Date, Type, Description, and Actions. The table contains four rows of example plans. A red arrow points to the 'Products' button in the 'Actions' column of the first row.

Name	Start Date	End Date	Type	Description	Actions
TEST EXAMPLE 1 - WEEK 1	01-02-2026	06-02-2026	custom	EXAMPLE PLAN FOR GUIDE 1	[Update] [Products] [Delete]
TEST EXAMPLE 2 - WEEK 2	08-02-2026	13-02-2026	custom	EXAMPLE PLAN FOR GUIDE 2	[Update] [Products] [Delete]
TEST EXAMPLE 3 - WEEK 3	15-02-2026	20-02-2026	custom	EXAMPLE PLAN FOR GUIDE 3	[Update] [Products] [Delete]
TEST EXAMPLE 4 - WEEK 4	22-02-2026	27-02-2026	custom	EXAMPLE PLAN FOR GUIDE 4	[Update] [Products] [Delete]

Viewing Production Plan Material Requirements

Once you have scheduled in your products to your plan, you can generate a PDF or Excel view of the material requirements for the plan, in order to do this you need to be in the 'View Proposed Products' page

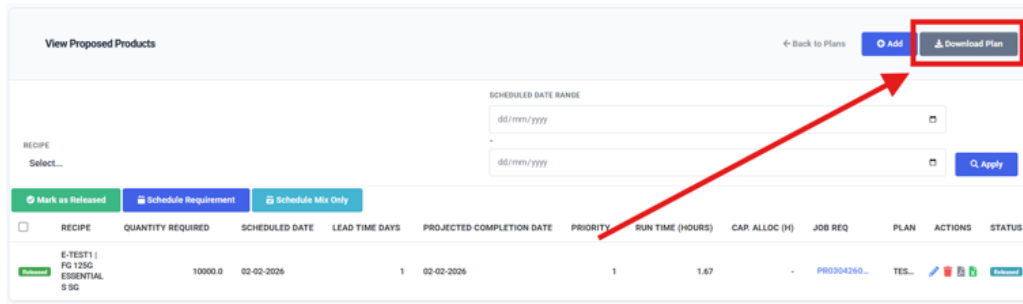


The screenshot shows the 'View Production Plans' interface. At the top, there is a search bar labeled 'NAME' and a '+ Add' button. Below the search bar is a table with the following columns: Name, Start Date, End Date, Type, Description, and Actions. The table contains four rows of example plans. A red arrow points to the 'Products' button in the 'Actions' column of the first row.

Name	Start Date	End Date	Type	Description	Actions
TEST EXAMPLE 1 - WEEK 1	01-02-2026	06-02-2026	custom	EXAMPLE PLAN FOR GUIDE 1	[Update] [Products] [Delete]
TEST EXAMPLE 2 - WEEK 2	08-02-2026	13-02-2026	custom	EXAMPLE PLAN FOR GUIDE 2	[Update] [Products] [Delete]
TEST EXAMPLE 3 - WEEK 3	15-02-2026	20-02-2026	custom	EXAMPLE PLAN FOR GUIDE 3	[Update] [Products] [Delete]
TEST EXAMPLE 4 - WEEK 4	22-02-2026	27-02-2026	custom	EXAMPLE PLAN FOR GUIDE 4	[Update] [Products] [Delete]

Viewing Entire Plans Material Requirements

To view an entire plans worth of material requirements select the 'Download Plan' button at the top of the page

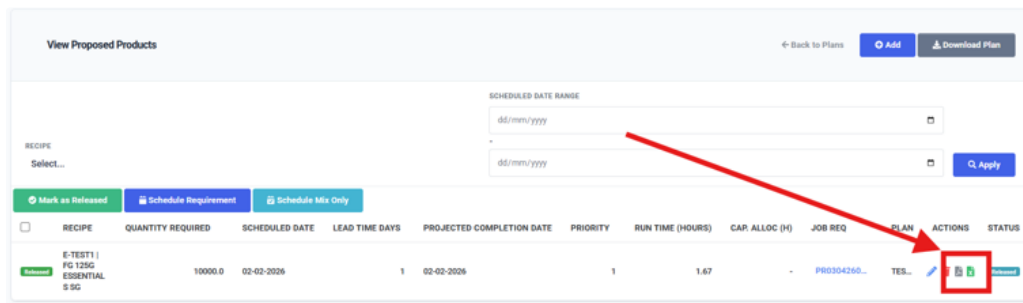


An excel file will be downloaded that lets you see the planned requirements and the materials needed, any variances in material will be highlighted with material shortages highlighted in red

Recipe Code	Recipe Name	Scheduled Date	Projected Completion Date	Quantity	Priority	Run Time (hours)	Commodity Code	Commodity Name	Required Quantity	Available Stock	Variance	Is Mix	Production Line
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	010454	BASE 80/20 SG	17850	100	-17750	NO	MAZZON11
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	012035	SG ESSENTIAL 202	0.001	0	-0.001	NO	MAZZON11
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	044276	ORIGINAL AR5488	892.5	258623.22	257730.72	NO	MAZZON11
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	056089	ESSENTIAL SRP RE	10000	161900	151900	NO	MAZZON11
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	099078	CARTON LABEL 10	10000	164400	154400	NO	MAZZON11
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	5557-53298A	125G ESSENTIALS 1	150000	391000	241000	NO	MAZZON11
E-TEST1	FG 125G ESSEN	2026-02-23	2026-02-23	10000	1	1.67	E-TEST2	SG ESSENTIALS TA	119	0	-119	YES	MAZZON11

Viewing Material Requirements for and individual Production Requirement

To view the material requirements for an individual product you can choose to view it in PDF format or in Excel, to view in PDF select the grey 'PDF' button next to the product or to view in Excel select the green 'Excel' button



PDF Example



PROPOSED MATERIAL REQUIREMENTS FOR E-TEST1

Report Generated - TraceSense

PROPOSED MATERIAL REQUIREMENTS			
ORDER DATE :	23 Feb 2026	PLAN :	TEST EXAMPLE 4 - WEEK 4
PLAN START DATE :	22 Feb 2026	PLAN END DATE :	27 Feb 2026
PLAN TYPE :		PRODUCT CODE :	E-TEST1
PRODUCT NAME :	PG 125G ESSENTIALS SG	REQUIRED QUANTITY :	10000.0
PROPOSED COMPLETED DATE :	23 Feb 2026	ADDED BY :	tracesense-soapworks
LEAD TIME (DAYS) :	1		

SKU Requirements					
Commodity	Required	Available	Variance	IS MIX?	PRODUCTION LINE
010454 BASE 80/20 SG	17850.000	100.000	-17750.000	NO	MAZZONI1
012035 SG ESSENTIAL 2021	0.001	0.000	-0.001	NO	MAZZONI1
044276 ORIGINAL AR548862	892.500	258623.220	257730.720	NO	MAZZONI1
056089 ESSENTIAL SRP REF 150	10000.000	161900.000	151900.000	NO	MAZZONI1
099078 CARTON LABEL 100MM*100MM	10000.000	164400.000	154400.000	NO	MAZZONI1
5557-53298A 125G ESSENTIALS WRAP	150000.000	391000.000	241000.000	NO	MAZZONI1
E-TEST2 SG ESSENTIALS TABLET	119.000	0.000	-119.000	YES	MAZZONI1

Excel Example

	A	B	C	D	E	F	G	H	I
1	Priority	Run Time (hours)	Commodity Code	Commodity Name	Required Quantity	Available Stock	Variance	Is Mix	Production Line
2	1	1.67	010454	BASE 80/20 SG	17850	100	-17750	NO	MAZZONI1
3	1	1.67	012035	SG ESSENTIAL 2021	0.001	0	-0.001	NO	MAZZONI1
4	1	1.67	044276	ORIGINAL AR548862	892.5	258623.22	257730.72	NO	MAZZONI1
5	1	1.67	056089	ESSENTIAL SRP REF 150	10000	161900	151900	NO	MAZZONI1
6	1	1.67	099078	CARTON LABEL 100MM*100MM	10000	164400	154400	NO	MAZZONI1
7	1	1.67	5557-53298A	125G ESSENTIALS WRAP	150000	391000	241000	NO	MAZZONI1
8	1	1.67	E-TEST2	SG ESSENTIALS TABLET	119	0	-119	YES	MAZZONI1