



How to: Manage the Reason-Step relation

11.1

January 2026

DOCUMENT ACCESS

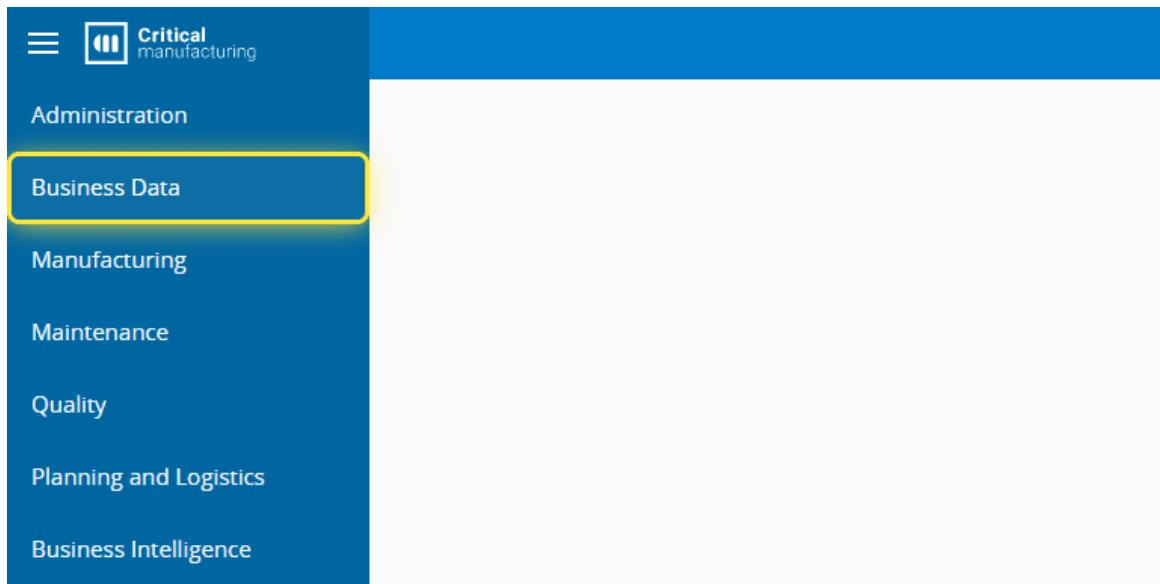
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How to: Manage the Reason-Step relation

1. Go to the Business Data menu.



2. Select the Step entity.



3. Search for your Step and select it.

Step

New Refresh Import Export Mass Update More Actions

Step

DEFAULT QUERY ▾

NAME	DESCRIPTION
Step_01	Step_01

4. Select the Reasons section.

Step_01

Step_01 (Active)

DETAILS

Step

Name: Step_01	Processing Type: Process	Material Tracking
Description: Step_01	Display Order: 18	Pass-Through: <input checked="" type="checkbox"/> No
Type: Process	Material Sort Rule Set:	Sub-Material Track State Depth: 0
Universal State: Active	Resource Sort Rule Set: <input checked="" type="checkbox"/> Resource Queue Size	Link Dispatch and Track-In by <input checked="" type="checkbox"/> Yes
	Lot/Traveler:	Default:
	Material Label:	Link Track-Out and Move Next: <input checked="" type="checkbox"/> No
		by Default:
		Track-Out Losses Mode: Main Material
		Use Split and Track-Out: <input checked="" type="checkbox"/> No

Information

Material Tracking

Material Tracking

REASONS

DETAILS

LOGICAL NAMES

AREAS

FUTURE ACTIONS

COSTING

SAMPLING

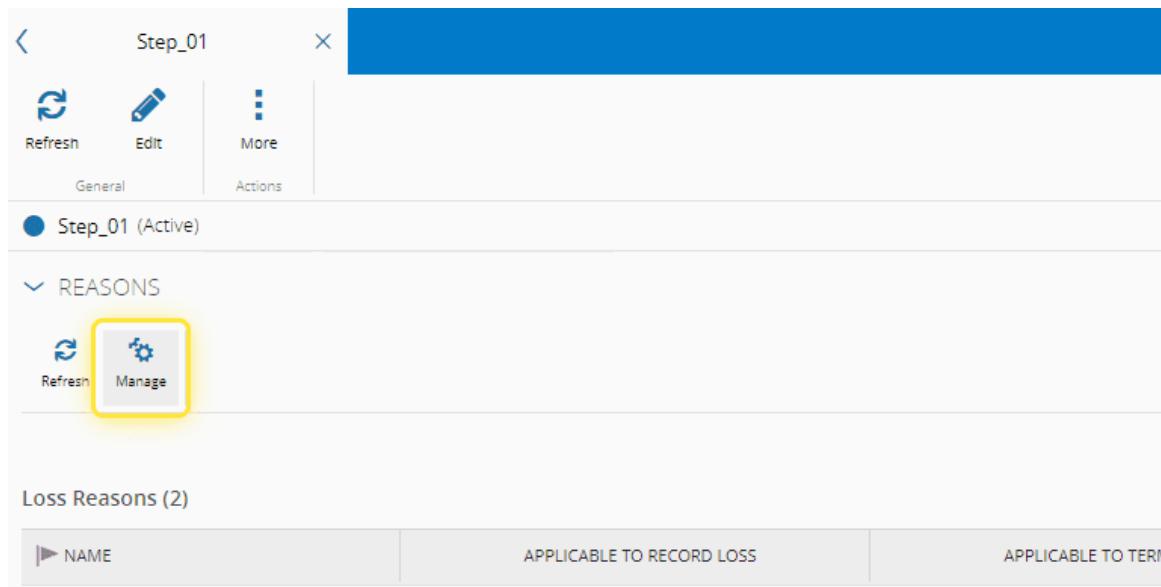
INSPECTIONS

SCHEDULING

ATTACHMENTS

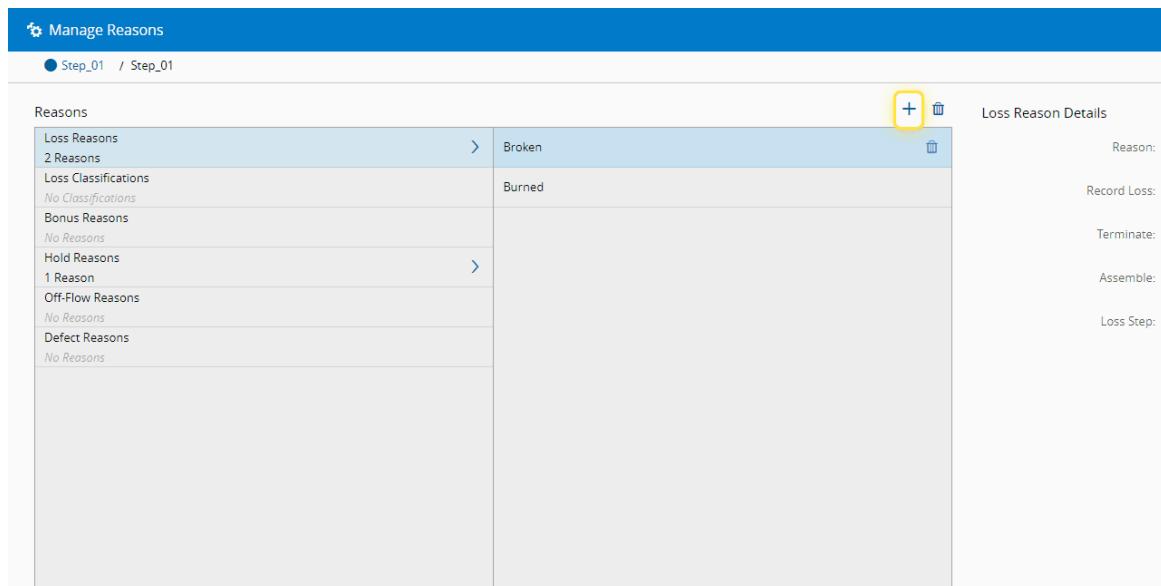
5. Select the Manage button.

For more information, see [Manage Reasons - Critical Manufacturing Documentation Portal](#)



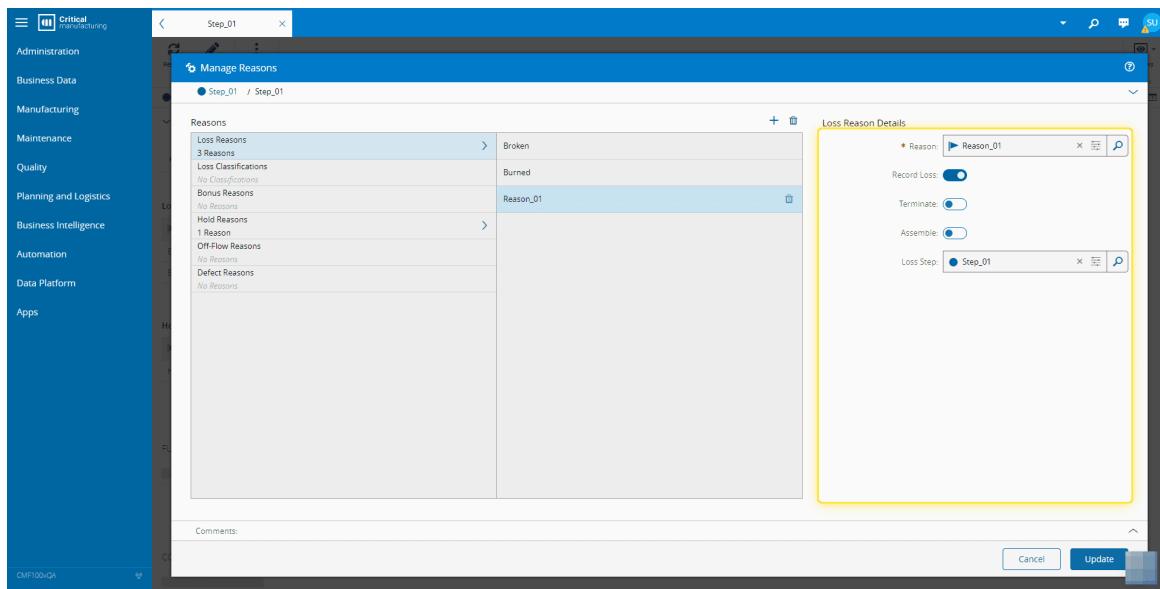
The screenshot shows the 'Step_01' screen in the Critical Manufacturing software. At the top, there are 'Refresh', 'Edit', and 'More' buttons, with 'General' and 'Actions' tabs. Below this, a list shows 'Step_01 (Active)'. Under the 'REASONS' section, there is a 'Manage' button, which is highlighted with a yellow box. The 'Loss Reasons (2)' table has columns for NAME, APPLICABLE TO RECORD LOSS, and APPLICABLE TO TERM.

6. Select + to add the Reasons you need.

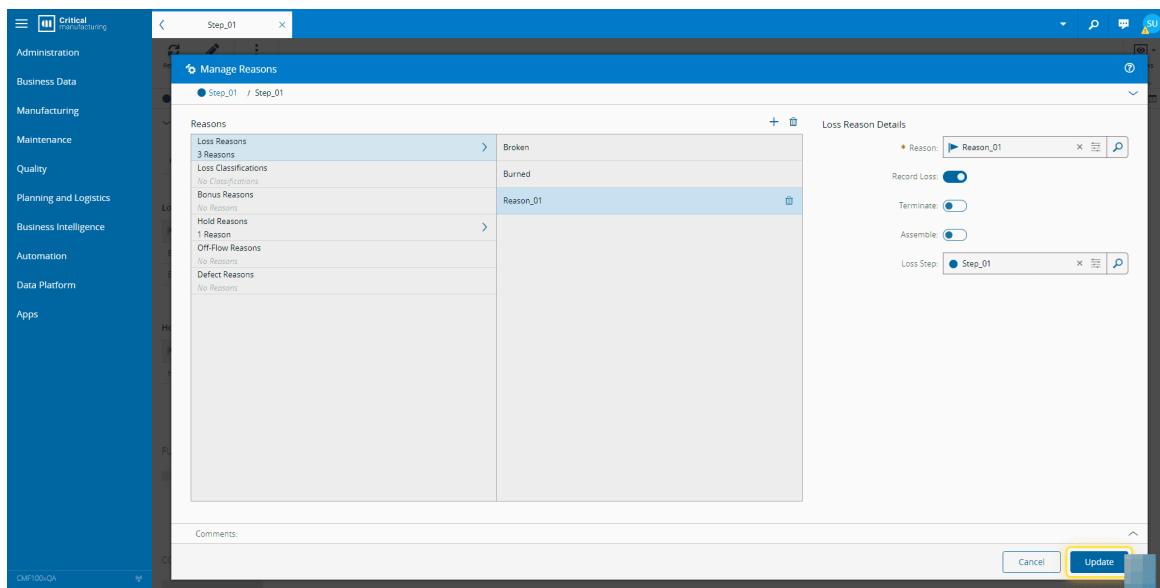


The screenshot shows the 'Manage Reasons' screen. On the left, a tree view shows 'Loss Reasons' (2 Reasons), 'Loss Classifications' (No Classifications), 'Bonus Reasons' (No Reasons), 'Hold Reasons' (1 Reason), 'Off-Flow Reasons' (No Reasons), and 'Defect Reasons' (No Reasons). On the right, the 'Loss Reason Details' panel shows fields for Reason, Record Loss, Terminate, Assemble, and Loss Step. A '+' button is highlighted with a yellow box in the top right corner of the list area.

7. In Loss Reason Details, complete the necessary fields.



8. Select the Update button.





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