



This document describes using work orders in CounterPoint. A work order is a document that controls the assembly of components to create finished goods inventory. 10/18/2005



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Overview

CounterPoint's Kits Option allows you to process work orders for inventory. A work order is a document that controls the assembly of components to create finished goods inventory.

Work orders are similar to kit transactions – both are used to assemble finished goods. A kit transaction is a one-step transaction that updates on-hand quantities and inventory costs immediately upon posting. A work order is a two-step transaction for assembling finished goods – work orders are first "issued" then "completed". Work orders allow you to automatically assign sequential work order numbers so you can track specific jobs. The first step in creating a work order is to issue the work order. The second step is to complete the work order. These functions are on different menu selections, allowing you to control user access to each step.

When setting up work orders, you can control whether or not the quantity available should be affected for the kit parent and/or component items. For example, you may choose to update component quantity committed (which makes those components unavailable elsewhere in CounterPoint) but not to update parent quantity committed (which makes the parent unavailable until the work order is completed). Serial numbers and lot numbers are not committed until the work order is completed.

You can either print work order forms as soon as the work order is issued, or you can print them later using batch printing. You can use CounterPoint's default work order form (**WKORD**) or define your own.





Setting Up Work Orders

In order to use work orders, you must have the Kits Option registered in CounterPoint.

CounterPoint 7.5					
Control	Camptown Sports				
Kit	s				
1. Component update method:					
	Qty sold Qty sold, costs & sales				
2. Miscellaneous kit distributio	on methods:				
Sales distributions Cost of goods distributions	Parent sales acct Parent expense acct				
3. Use work orders ? 4. Next work order # 5. Default work order form ID	Y 1049 WKORD Standard work order				
6. Commit W/O parents ? Commit W/O components ?	Y Y				
Field number to change ?					

Select Setup / Inventory / Control to enable work orders in CounterPoint.

Use work orders ?

Specify whether or not you want to use work orders by selecting Yes or No.

Next work order

Enter the next work order number you want to use. An entry is required in this field.

Default work order form ID

Enter the work order form ID you want to use.

A pre-defined form named **WKORD** is included with CounterPoint (see <u>Work order forms</u> for more information).

Leave <blank> for None.

Commit W/O parents ? Commit W/O components ?

Specify whether or not you want to update quantity committed for parents and/or components when a work order is issued.

Specifying **Yes** for the parent makes the finished good available as soon as the work order is issued. Specifying **Yes** for the components makes the components unavailable for other purposes as soon as the work order is issued.



Using Work Orders

Issuing work orders

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F1 F2 F3 ()				en
Issue work orders			Camptown Sports	us
				Wo
1. Work order #	1049	Status:	New	Yo
Kit item #	BIKE	Bike package	e	ne
2. Kit location	MAIN Main Store			pri
3. Comp location	"All"			the
4. Trx type	Assemble	Track meth:	Always serialized	en
5. Issue date 6. Completion date	5/09/02 None	Kit type: Stock unit:	Comp tracked	or
o. completion date	none	STUCK UNIT.	LHGII	iss
7. Trx quantity	1			or
8. Serial/Lot #	901156			010
9. New/used 10. Source	New ACM			W
11. Reference	non			ne
				yo
				-
Field number to change ?				au
F1=Next F3=Delete				WC
				or
				the

Work orders are entered and issued using **Inventory** / **Work orders** / **Issue**. You can enter a new work order, print an edit list, then post the entered work orders to create issued work orders.

When entering a new work order, you can press F2 to auto-assign the work order number or you can enter the number

manually. The Work order # is equivalent to the Document-# for a kit transaction.

Press F1 to view entered (un-issued) work orders.

CounterPoint 7.5	Y
	re
Issue work orders Camptown Sports	se
Wrk ordr #: 1049 Status: New	fo
Kit item #: BIKE Bike package Kit loc: MAIN Main Store Trx type: Assemble Cmp loc: "All"	or
Issue date: 5/09/02 Kit type: Comp tracked Trx qty: 1	or
Comp-item-# Description Loc Quantity Unit	th
HUF0001 Bicycle, "The Terminato MAIN 1.000 EACH \$#:90123 ACM0001 Helmet MAIN 1.000 EACH	re
ACM0002 Horn, standard MAIN 1.000 EACH	W
	m
	CC
	рс
	AI
	id
	us
	in
	tra
F2=Next modifiable component	to
	ch

You are not required to enter serial/lot numbers for tracked items on a new work order. However, these values are required before the work order can be marked as completed and posted.

All other fields are identical to those used for kit inventory transactions. Refer to the User Manual chapter titled

"Entering a Kit Inventory Transaction" in the electronic documentation for additional information on the other fields on the screen.





Posting work orders

To issue a new work order, select Inventory / Work orders / Issue / Post.

You may optionally print an edit list prior to posting. Refer to the User Manual chapter "Printing a Kit Transaction Edit List" and in the electronic documentation for detailed instructions on printing an edit list. You may also use **Inventory / Work orders / Batch print** to print a work order form prior to (or after) posting (see <u>Batch printing</u> for additional information).

Completing work orders

For issued work orders, use the menu selections under Inventory / Work orders / Complete to edit, complete, or cancel the work orders.

🔯 CounterPoint 7.5				Pre
F1 F2 F3 () Complete work orders	$\textcircled{\textbf{2}}$		Camptown Sports	woi Cor
complete work orders				
1. Work order #	1049	Status:	Issued	Pre wo
Kit item #	BIKE	Bike package	e	Can
2. Kit location 3. Comp location	MAIN Main Store "All"			WO
4. Trx type 5. Issue date 6. Completion date	Assemble 5/09/02 None	Track meth: Kit type: Stock unit:		ren pos
6. Completion date 7. Trx quantity	none 1	STOCK UNIT:	EHUN	Pre
8. Serial/Lot # 9. New/used 10. Source 11. Reference	New ACM			the car a w ma
Field number to change ? [(the orig
F1=Next F2=Complete F3=Cancel				Pre mo

Press F2 to mark a work order as Completed.

Press F3 to mark a work order as Cancelled. Cancelled work orders are removed during posting.

Press F4 to Undo the completed or cancelled status of a work order and mark it as Issued (the work order's original status).

Press Enter to modify the

components. When the component entry screen is displayed, you can press the F2 key to go to the next modifiable component.

To return to the first screen (for example, to complete a work order after modifying its components), press the **Up** arrow key or **Page Up** to return to the first component, then press **Page Up** to return to the first screen.

Posting completed work orders

After you have marked a work order as **Completed**, use **Inventory / Work orders / Complete / Post** to update the on-hand quantities of your inventory and create historical information.

You can choose to post only those work orders that have been marked **Completed**. Alternatively, you can choose to post work orders that have been **Issued** but not **Completed**. For example, you could post "all work orders that were scheduled for completion today" without having to individually mark each work order as **Completed**.

When work orders are posted, the Work Order Activity Journal is created. Historical information is created in a manner similar to posting kit inventory (assemble)





transactions. Refer to the User Manual chapter entitled "Posting Kit Inventory Transactions" in the electronic documentation for information on entering screen parameters used to post work orders.

Posting will remove cancelled work orders.

Batch printing

CounterPoint 7.5 FIF2F3 () () () () () () () () () () () () ()) Campt	Ese Ese ese own Sports	Use batch printing to print or reprint a batch (or group) of
2. Work order status 3. Kit item range	"First" to "Last" New Issued Completed		work orders. You can batch print New (entered but not issued), Issued, Completed, or All work orders.
F1="All"			

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Work order forms

The pre-defined form, **WKORD**, is provided for work orders. You can install the form by running **File Utilities / Special / System / Update pre-defined data**. If required, use **Setup / Inventory / Forms** to make a copy of **WKORD** and customize it to meet your requirements.

Date: 05/11/02 Time: 21:58:26	WOR	к о	RDER			NO. 20008 No. 1
Kit item No: 10	0 Bike Pa	ackage				late: 05/11/02 late: 05/14/02
Qty req'd:	1				Locat	tion: MAIN
Component-item	Description-1 Description-2					Notes
101 Location: 1	All sport bike		Serial #:	1 600	1	
102 Location: 1	All sport helmet			1	1	
103 Location: 1	Seat Cover			1	1	
3 components Total component qty req'd: 3						
Date completed:		Sign	ature:			
Date inspected:		Sign	ature:			

Multi-Site Notes

If you are using work orders in a Multi-Site environment, the following applies to work order processing:

- Work order transactions are not transmitted from a Hub to a Satellite.
- At the Satellite, only work orders that have been completed and posted are transmitted to the Hub.
- Like other kit transactions, work orders that are completed and posted at a Satellite must be manually posted at the Hub after import. They are not automatically posted during overnight processing.

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