Work Orders

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.

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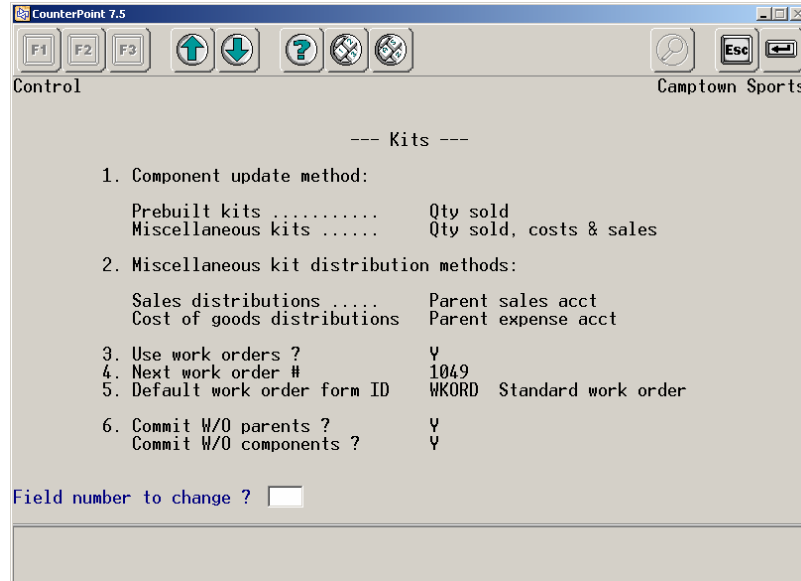
Select **Setup / Inventory / Control** to enable work orders in CounterPoint.

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 Work order forms 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

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.

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 Batch printing 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.

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
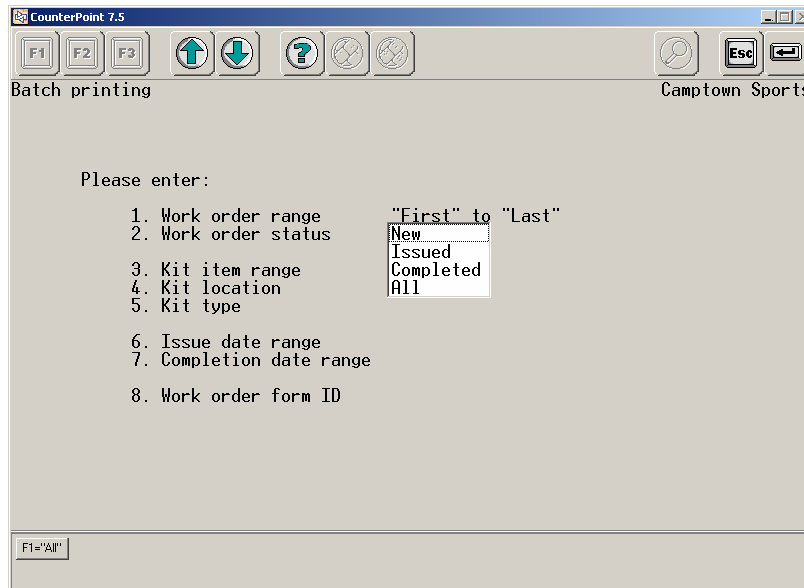
Use batch printing to print or reprint a batch (or group) of work orders. You can batch print **New** (entered but not issued), **Issued**, **Completed**, or **All** work orders.

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                W O R K   O R D E R      Work order No.    20008
Time: 21:58:26                                              Page No.        1

Kit item No: 100           Bike Package                    Issue date: 05/11/02
                                                        Complete date: 05/14/02

  Qty req'd:        1                                         Location: MAIN


-------------------------------------------------------------------------------
Component-item  Description-1            Qty-per-kit   Qty-req'd    Notes
                Description-2
-------------------------------------------------------------------------------

101          All sport bike                  1           1   _____
Location: 1                             Serial #: 600

102          All sport helmet               1           1   _____
Location: 1

103          Seat Cover                     1           1   _____
Location: 1




-------------------------------------------------------------------------------

   3 components          Total component qty req'd:          3

Date completed: _____   Signature: _____

Date inspected: _____   Signature: _____
```

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.