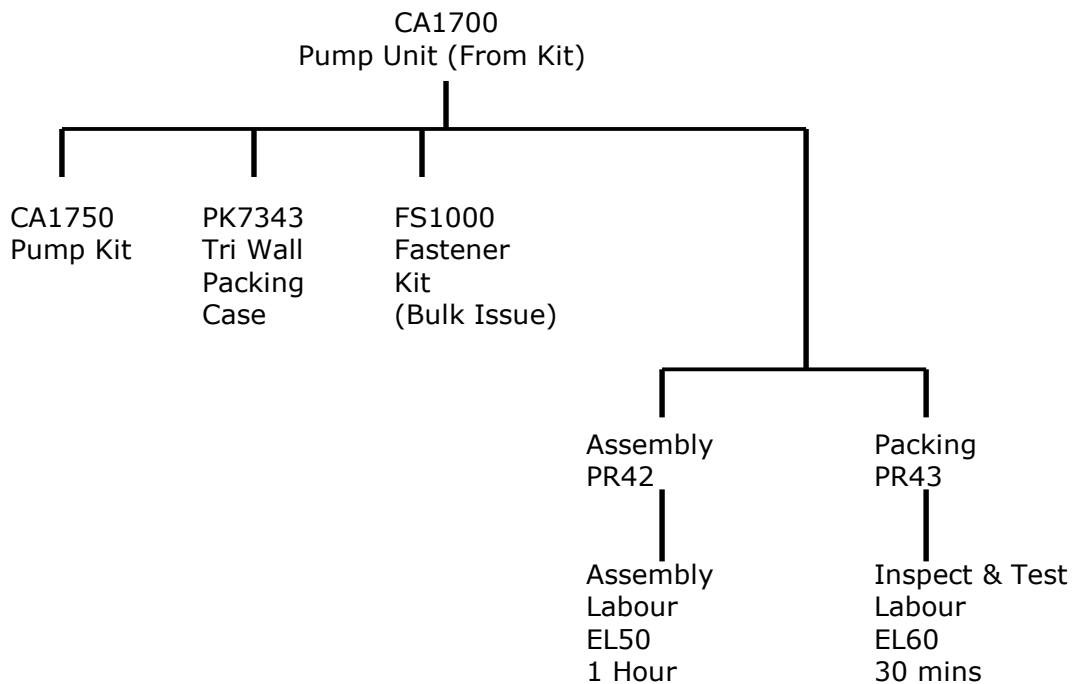


CAUTION !! All new procedures and processes should be checked in the 'Test' environment before being applied to the 'Live' business system.

WORKS ORDER PROCESS – MAKE TO ORDER (MTO) Ver 3

This datasheet lists the variances unique to the MTO process from the 'Works Order Process - Make to Stock' datasheet, which should be read first or in conjunction with this document.

The assembly shown below has been used to generate the screens shown in this document.



Separate data sheets are available regarding

- Supply/Demand
- Capacity Planning
- Works Order Scheduling
- Bill of Materials
- BOM Costing.

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1. Create the Works Order

Works Order Processing, Order Maintenance, Create Works Order, Manufacture to Order

The screenshot shows a window titled 'SMS-CREATE-WORKS-ORD - Sapphire Technologies R&D Demo'. Inside, there is a form with the following fields:

- Order Number: []
- Date: []
- Customer: []
- Their Reference: []
- Salesperson: []
- Area: []

At the bottom of the window, there is a button labeled 'Create Works Order'.

1.1 Enter a '/' search to select the required Sales Order Number and then press Return

The screenshot shows the same window as above, but now the form is populated with data:

- Order No: 10093
- Date: 26 Aug 2005
- Country: GB
- Currency: Pounds
- Account: G001
- Short Name: []
- Company: Grovewood Machinery
- Exch Rate: 1.000000000
- Address: 20-25 Victoria Road, Grangetown, Sunderland
- Due Date: 15 Nov 2005
- Their Ref: PUR32847
- Contact: Mike Hardigan
- Telephone: 0191 510 3877
- Settlement: NO
- Payment Term: 0 Days
- Value: 1750.00

At the bottom right, a dialog box titled 'Create Works Order' is open, showing a question mark icon and three buttons: 'Complete Order', 'Selected Lines', and 'Exit'.

The order header is displayed and the option given to produce works orders for the Complete Order or Selected Lines. In this example Selected Lines is chosen, although there is only one line on the Sales Order

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1.2 The selected Sales Order line is displayed

Item Number	Description	O/S Order Qty
CA1700	PUMP UNIT (FROM KIT)	2.0000

Description 2 Due Date
WIP Despatched Invoiced

Press 'Return' on the selected line

Sales Order Line Transfer

Item Number
Description
Quantity
Due Date
Start Date
End Date
Depot
Create Works Orders for sub-assemblies? (Y/N)

Note!! If the selected BOM is a multi-level structure, the option will be given to 'Create Works Orders for sub-assemblies'. If this is accepted (Y) the system will calculate the quantity of each Sub-Assembly required to build the top level Item and create the Works Orders.

The Quantity entered is the same as the Sales Order line, and this cannot be amended here. The Due Date is the Sales Order Due Date.

The Works Order Start and End Dates are important to the overall operation of the Materials and Capacity planning facilities of Sapphire. The Supply/Demand enquiry screen for example, uses this Start Date to define when Materials are required for the Works Order. Similarly, the MRP report also uses these dates.

The End Date should be set say 5 days before the Sales Order due date, to meet the Sales Order demand.

When the header data has been entered the system returns to the previous screen, with the already selected item now shown in inverse video. Additional lines (if present and applicable) can now be selected and actioned in a similar way.

Item Number	Description	O/S Order Qty
CA1700	PUMP UNIT (FROM KIT)	2.0000

Description 2 Due Date
 WIP Despatched Invoiced

Create Works Order

1.3 Press 'ESC' to move to the Create Works Order screen, which confirms the order(s) to be generated.

Data Sheet for Works Order Process - MTO

Bill Of Materials

Quantity Reqd	Start Date	End Date
2.0000	01/11/2005	10/11/2005

In Stock Allocated Free

Description Order Number

Create Works Order

Press ESC to display the base menu.

Create Works Order

'**Reenter**' enables the Quantity and Date information to be amended.

'**Create Works Order**' confirms the data entered and displays the following screen with the issued Works Order number. Press ESC to return to the menu.

The following works Orders have been created

Order Number	Item Number	Quantity
5073	CA1700	2.0000

Press ESCAPE to continue

Create Works Order

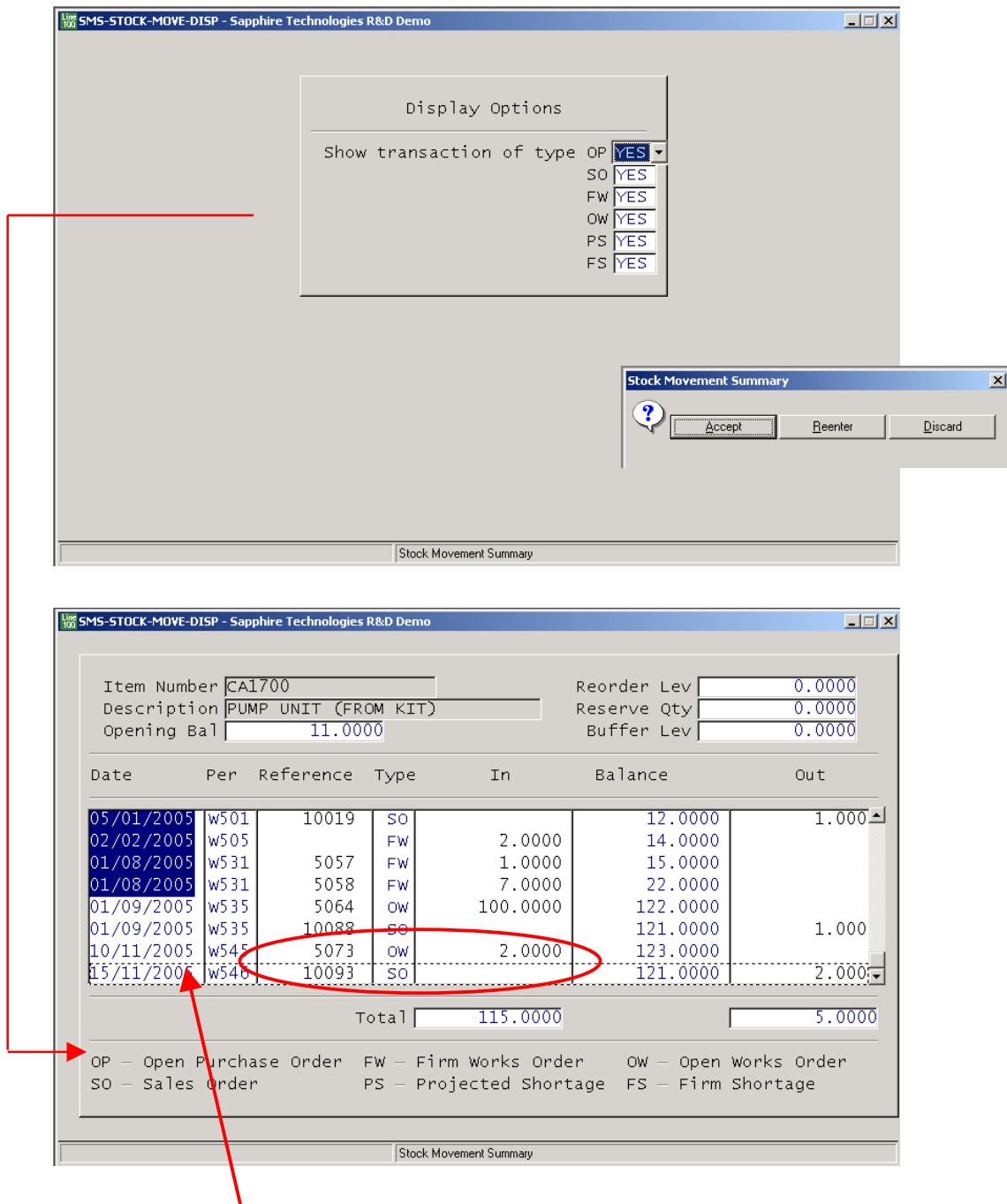
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1.4 The created Works Order can now be viewed as an open works order (OW) transaction through the menu option *Stock Control, Enquiries, View Supply/Demand, <item number>*. The enquiry can be filtered to display various transaction types – these are detailed below. Accept all options.



The Enquiry uses the End Date entered against the Works Order as the date that the manufactured Stock will be available (Due Date). This screen would assist a production controller and can be made available to any other users that may require the information. Double clicking the line enables the drill-down capability.

The Sales Order demand (10093) and the matching Works Order supply (5073) are shown

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2. Issuing Component Stock to the Works Order

Please refer to the Works Order Process - Make to Stock datasheet

3. Viewing Component Stock Issued to the Works Order

Please refer to the Works Order Process - Make to Stock datasheet

4. Works Order Cost Report

Please refer to the Works Order Process - Make to Stock datasheet

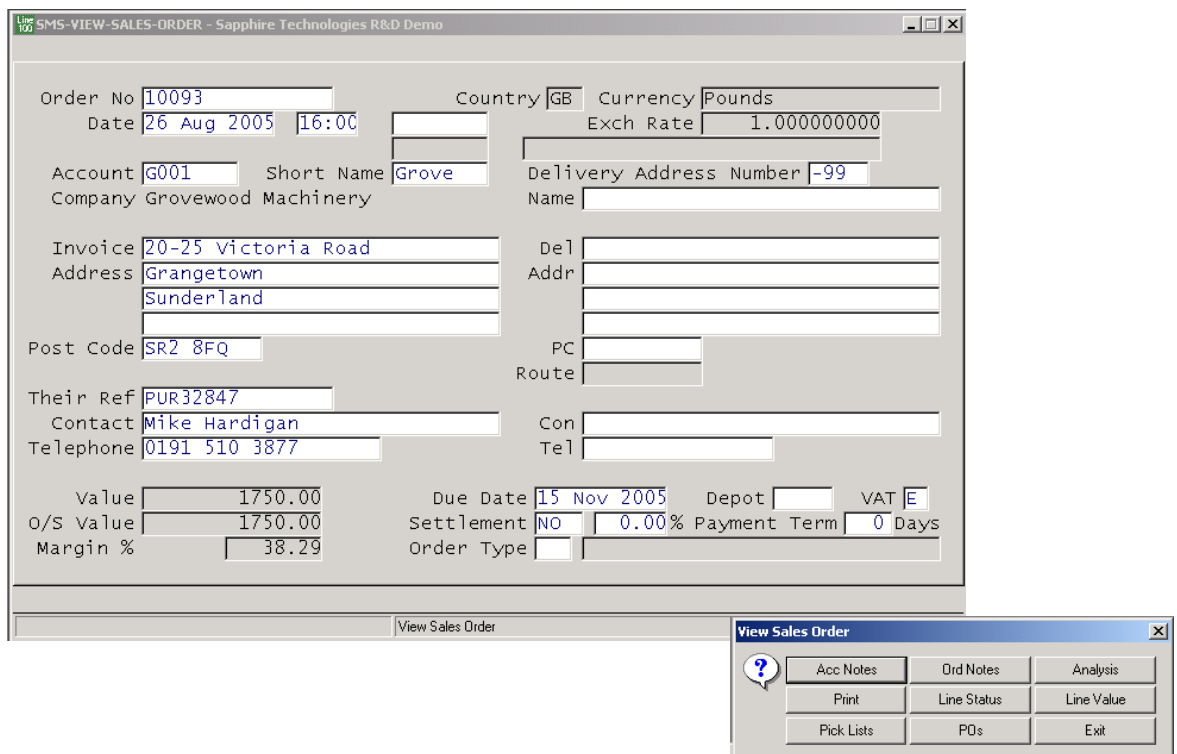
5. Works Order Tracking

Please refer to the Works Order Process - Make to Stock datasheet

5A. Sales View of the Works Order

As the Works Order has been linked to a specific Sales Order, the facility is available for the sales personnel to drill down from the Sales Order and view progress of 'their' order.

Select *Sales Order Processing, Enquiries, View Order, By Order*. Enter the order number or select from the drop down list. The sales order header is displayed with a base menu



Select Line Status

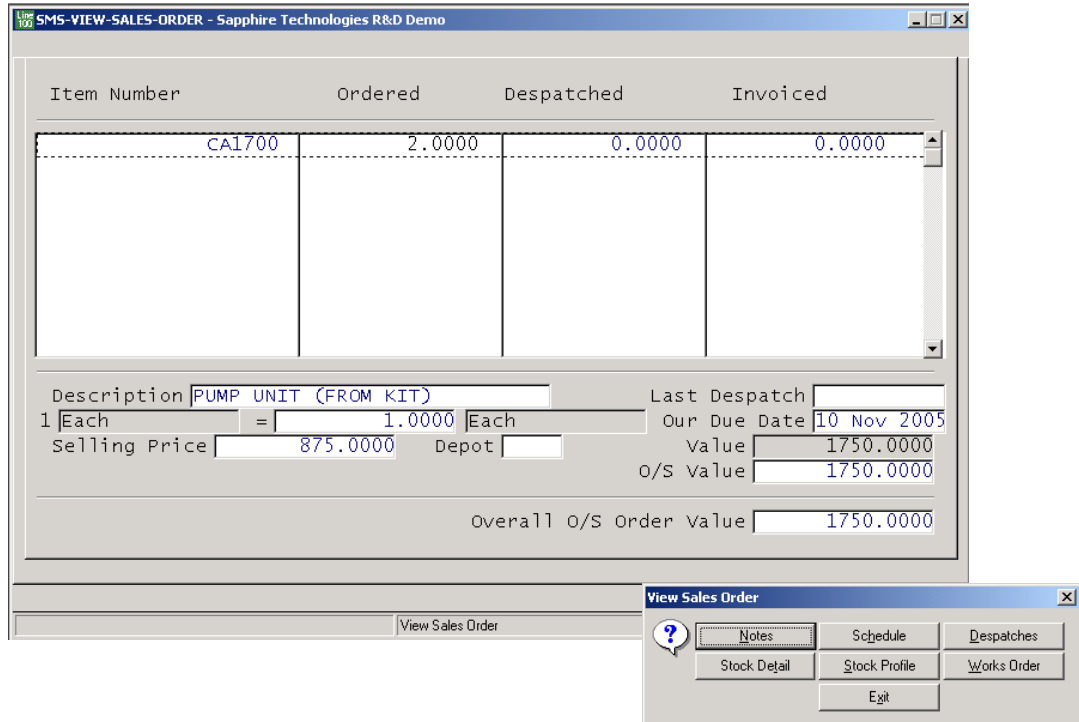
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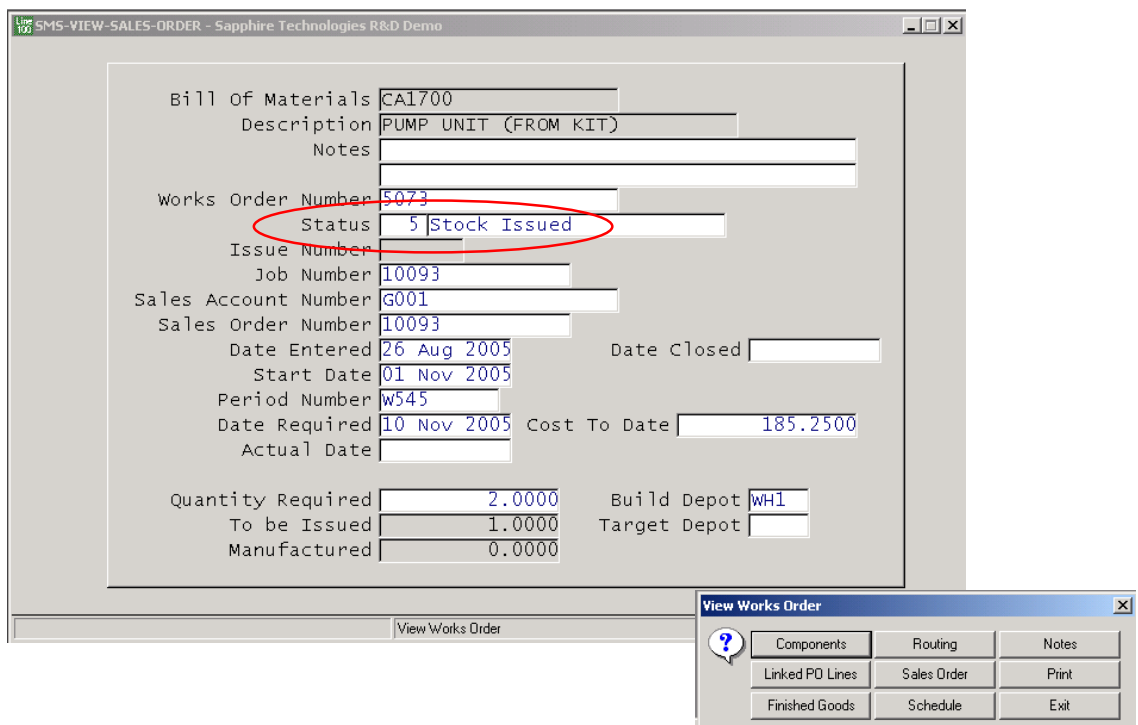
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Data Sheet for Works Order Process - MTO



'Return' or 'double click' on the line to display the base menu

Select Works Order to drill down



Note the status of the Works Order – in this example 'Stock Issued'

Further drill downs are available from the base menu.

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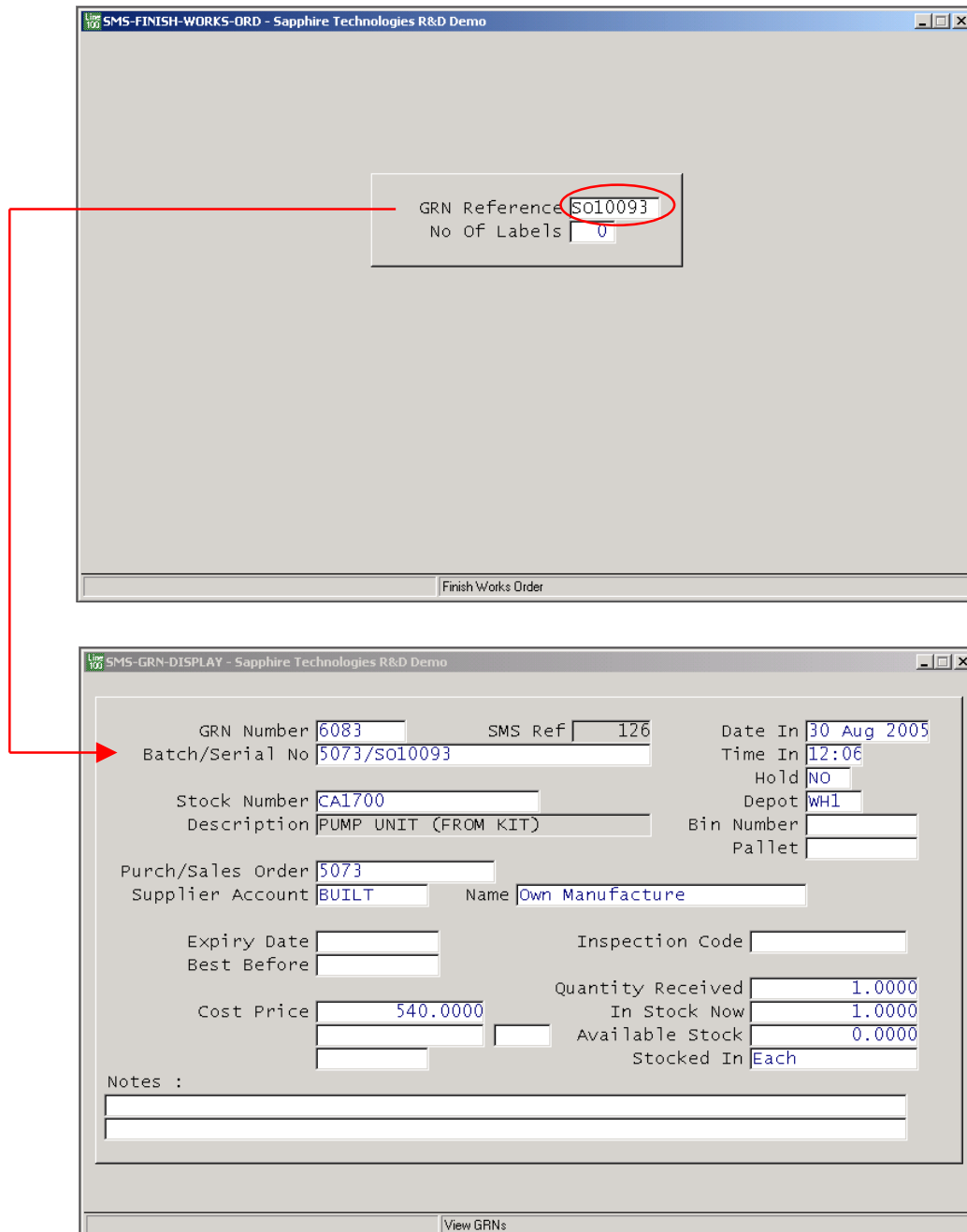
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6. Receiving the completed Works Order Goods into Stock

Please refer to the Works Order Process - Make to Stock datasheet

In addition to the above, it may be useful to add the Sales Order number as the GRN Reference, so that the batch can be readily identified



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7. Stock View – Supply Demand

Please refer to the Works Order Process - Make to Stock datasheet

8. Stock View – Stock Card

Please refer to the Works Order Process - Make to Stock datasheet

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