

Production Kits Samco Power Accounting

Production Kits for Samco's Power Accounting System is an extension to the existing bill of materials / kits feature set which provides users with enhanced work flow and reporting facilities.

Some of the improvements include:

- Prints a production work order for assembly and a bill of materials listing for picking inventory.
- Integrates with Order Entry Plus by automatically creating production orders in Kit inventory for custom kits and back orders.
- Component availability is checked during order entry to warn the sales person of shortages.
- Kits can be assigned and tracked by production line for determining work load distribution.
- Transactions are assigned production numbers for tracking.
- Kit transaction find function has been improved, providing more information and allowing you to see what's in the queue from anywhere in the system.
- Parent and component warehouses can be assigned at the kit level and then altered at the transaction level.
- Identify component shortages and list back ordered kit information with the new Component requirements report.
- A versatile Production report allows you to see where things are at today and forecast future needs.
- Handles products manufactured by weight with verification that the component weights match the manufactured weight.

This document touches on the areas affected by the new features and is intended as a companion to the existing Inventory Plus user manual.

Inventory Setup

Control Information

Going into the **Inventory Plus >> F2 >> Setup >> Control information** the following fields need to be set:

- *Next kit production number*: This is a tracking number used for each kit transaction, and is printed on the trailer document(s).
- *Production card printer*: Unnecessary for our use here. Set to any printer you want as we wont be using it.
- *Alt. productions card printer*: Also unnecessary for our use here. Set to any printer you want as we wont be using it.
- *Production W/O printer*: Enter the default printer where you want the product work orders / trailers printer.
- *Default warehouses kit/com*: When setting up kits and kit transactions, these we be the default warehouses for putting the finished goods into (kit) and removing raw materials from (comp).

- *Modify kits hen trans exist:* Answer Y if you want the ability to change a kit profile even if an unposted kit transaction exists.
- *Kit posting document date to use:* Choose the date to use when posting kit transactions (D = delivery date, S = system date, or T = transaction date).
- *Set warehouse in kit header?* Answer Y if you want to be able to be able to change the kit's destination warehouse and the raw materials / component warehouse.

Production Line Codes

Production line codes are used to identity “where” a kit is going to be produced. This code is then printed on the production work order, can be used for other reporting purposes, and shows up on the *Find kit transactions* function.

These codes are setup in **Inventory Plus >> F2 >> Setup >> Production line codes** and consist of a code and description.

Inventory Plus

Kits >> Enter

Note: Under the Kits menu option is a “User defined fields” function which is not used for our purposes.

There have been a number of new fields added to the kit definition:

- *Kit/Component warehouse:* Here you define the warehouses the kit will be placed into and the components will be drawn from. This only applies to multi-warehouse environments.
- *Customer:* If this kit is for a specific customer you can enter the customer whom this kit belongs to.
- *Weight formula:* Answer Y if the kit is a weight formulation and you want the system to ensure the kit weight equals the components aggregate weight.
- *Batch weight:* If you answered Y to the *Weight formula* enter the batch weight for the kit.
- *Weight unit:* Enter the unit of measure for the kit weight.
- *Custom kit:* Answer Y if this is a custom kit. During **Order Entry >> Orders** if you do a back order for a custom kit the system will automatically create a kit transaction for the order.
- *Sort production cards?:* This field can be left an N as it is not required for our purposes.
- *Production card format:* Should be set to either W for work order or N if you do not need to print a production work order for this kit.
- *Production line:* Enter the default production line code where the kit is normally made. This can be changed within the kit transaction.

Kits >> Print

This report can now be narrowed down to a specific customer or customer range.

Kit inventory >> Enter

The following new fields have been added to the kit inventory transaction entry function:

- *Order number / Customer:* Enter the *Order Entry* order that this kit transaction applies to. The corresponding customer information is automatically displayed.
- *Delivery date:* Enter the date the product needs to be ready for delivery.
- *Orig del date:* The system automatically tracks the original delivery date as a frame of reference.
- *Comment:* Enter a comment about this kit transaction.
- *Custom order?:* Answer Y if this is a custom made order. It will default to Y for orders automatically created from *Order Entry*.
- *Postable?:* This field has been modified such that after a production work order has been printed the options become “Okay to post” or “In process”. New kit transactions that require a work order can no longer be set to post immediately. The production work order must be printed first and then the postable status changed.
- *Batch quantity:* For weight kits, enter the size of the batch.
- *Production line:* Enter the production line code where the kit is to be processed.
- *F4=Print:* On the component entry screen, once you’re ready to send a production work order out to be processed, press F4 to print the production work order.
- *F4=Post ok:* On the component entry screen, after a production work order has been printed, you now have the option of press **F4** to set the kit transaction to be postable. You still need to post the kit transactions via **Kit inventory >> Post**.
- *F5=Total weight:* For batch weight kits, enter F5 to calculate the total weight of the kit transaction.

Kit inventory >> Edit list / Post

The kit inventory edit list and posting can now be narrowed down by production #.

Kit inventory >> Print production cards

This new function allows you to reprint production work orders.

Kit inventory >> Print production report

A new report which provides a look at what has been or is in process – or a bit of both!

Reports >> F2 >> Component requirements

The new component requirements report shows you what you’ll need to fulfill your existing kit transaction work orders.

Find Kit Transactions

Press **F8 >> Z** to display a window, similar to the following, showing kit transaction in process:

Find kit transactions			
Prod#/Stat	Ord#/Del	Customer/Comment	Item desc/Qty
*01) 53006	0-000038	W.J. Bjornfreg A/G	Kit, Bird House Max
Complete	1/24/06		10.00
02) 53007	0-000039	Harris, Goldberg & Jones	Kit, Bird House & Feeder
Unscheduled	10/28/05	*** SPECIAL ORDER ***	120.00
03) 53008	0-000039	Harris, Goldberg & Jones	Kit, Bird House Max
Unscheduled	10/28/05	*** SPECIAL ORDER ***	60.00
04) 53009			Kit, Bird House & Feeder
Unscheduled	10/20/05	RESTOCKING	32.00
05) 53010			Kit, Bird House Max
Work in Process	10/03/05	RESTOCKING	12.00
06) 53011	0-000040	Beverly Beauty Supply	Tim Horton's Extra Large
Work in Process			100.00
07) 53012			Kit, Bird House Trek
Unscheduled	10/11/05	DEMO INVENTORY	1.00
08) 53014	0-000042	Whitestone Gary	Kit, Bird House Trek
Unscheduled	10/07/05		5.00
Customer: "All"		Item: "All"	Order: "All"
F1=next, ShF1=prev, F3=Search, F5=Customer, F6=Item, F7=Order			

From this window you can search by production number (F3), by customer (F5), by item (F6), or by order number (F7).

The order statuses are complete (postable), unscheduled (a work order has not been printed), and work in process (a work order has been printed).

Order Entry Plus

Orders >> Enter

Here are some of the changes which affect this area of the *Order Entry Plus* module:

- When entering a back order for a kit that is flagged as custom (see above), the system will automatically generate a kit transaction.
- When entering a line item for a kit, the system checks the component stock to make sure there is sufficient quantities to make the kit item. A window will appear with the deficiencies if there is a problem.
- A warning appears if a user tries to release a back orders that is assigned to a kit transactions which has not been flagged as postable.

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