

Cut and Mark Order Processing

ORDER ENTRY PATH:

S-sales>T-transaction>O-order/bid>(see example #1)

Enter thru "NEW" onto "CUSTOMER" and enter customer's account number, which will be found on order worksheet. When you enter customer account number, the Order Header screen will come up (see example #2).

Send to: Use F3 (universal lookup key) to pull up shipping addresses--see order worksheet for address—then use F2-accept.

Contact: see order worksheet--ordered by and phone number--enter these on that line.
Address: This will automatically come up with the "SEND TO" portion.

Freight terms: see FOB portion of order worksheet. Our warehouse: S=shipping,
Destination: D

Delivery Instructions: Any customer shipping requirements, which will be written at the bottom of the order worksheet--Special instructions area.

Due Date: See Dock Date on order worksheet.

Horizon: See Ship Date on order worksheet

Carrier: See Ship Via on order worksheet

Order Date: Is on order worksheet

Sale Type: Always "W" on production orders.

Writer and Salesman: DO NOT CHANGE. These are already built into customers master file and will already be on the order header.

Order Type: Always change from "C" to "V" for Value Added Services.

Tax Exempt: Change to "Y" except when delivery instructions says ***TAXABLE***

Enter thru the following as they are NOT to be changed:

BLIND BILLING

DISCOUNT METHOD

TERMS CODE

SHIP COMPLETE

DISPATCH METHOD

INSCO C OF C

SPECIAL LABEL

Now press F2 to accept. This will bring you back to Example # 1.

Reference: This is the Customer Purchase Order Number on order worksheet.

Now back to Example #1: Item: Refers to customer's part number.

NOTE** To check if a part number has already been built. When you are in the item field, press F3. A green box will pop up(see example #3). Enter down one line to ITEM CODE and type in: C&M-12345 (example for customers part number)(see example #4) and enter. If part numbers have already been built for this customer, a list will show on the screen. At this point, you can choose the one you need or build a new part number. Assuming we have not yet created an Insulation Supply Company item number for this part, create customer ordered items using the C&M template (see example #5). Type C&M from the item entry line and the item template choices will pop up. Choose the first one C&M--see example #5. See example #6 for the NON-STOCK ITEM CREATION.

Non-Stock Template: Type in: C&M: Fills in automatically.

Item Code: Type in: C&M-12345-1 The customer's account number being 12345.

Always use a five -digit number. If customer has a four-digit account number such as 1234, then use 01234.

Long Description: This is the customers actual part number, such as: 987654-1 REV A or 1/4 RNF-100 BLK. This will be found on order worksheet under CUSTOMER P/N

Short Description: Will appear when you hit the enter key. Enter thru to next line.

Standard Cost: Enter .0001 on this line.

ENTER THRU ALL OF THE FOLLOWING:

Serial: Sales

Inventory

Service

Weight

Volume

Lot Tracking

Allow Cancel

Allow Return

Status

Supplier/Item

Supplier: Will always be: INSCVA

Part No: DO NOT ENTER ANYTHING.

PP UOM: Will always be: EA

Lead Time: DO NOT ENTER ANYTHING.

Customer/Item

Customer: Will be in automatically

Part No: Enter customers part number from LONG DESCRIPTION above. Entry of this part number will not allow spaces, so you have to use an underscore (_).

Description: DO NOT ENTER ANYTHING. Just enter through, then press F2--to save. A box that says "Order Certifications" will pop up. Press F2.

Whse Pack and Qty: will fill in automatically.

Qty: Put in quantity from order worksheet, then enter thru to PRICE, and put price in according to SELL PRICE on order worksheet.

Repeat the procedure if there are more items the on the order worksheet. Then press F2 to save and a sales order will be created and appear on the screen. Write this number on your order worksheet.

NOTE The "F1" help key is available for any further instruction in any field.

BILL OF MATERIALS

BILL OF MATERIALS PATH:

D-production> M-maintenance> B-bill of materials> M-master> (see example #1)

Bill of Materials: Enter the C&M part number that was built in the sales screen. (example C&M-12345-1)

Long Description: Will be the customer's actual part number from example #4-the C&M Non-Stock Item Creation.

Short Description: Will automatically appear after you enter the long description above.

Item Code: will be the same C&M part number from Bill of Materials above.

Batch Size: LEAVE AT 1. Do not change.

Chart: Press F3 key and 01 C&M Work will show on screen.

Section: Press F3 key and 1 Cut & Mark will show on screen.

Recovery: Press F3 key and 99 Recovery will show on screen.

Explode Level: Will be "L". Do not change.

COMPONENTS

Item: This is the material line on the order worksheet, under customers part number. When you enter the material, if there is more than one type--S-spoiled, 4-for 4-foot lengths or UL--listed on the purple screen, make sure you select the one on the worksheet. Also, notice on the purple screen, an Insko stock number will show on the

same line. This stock number will now appear in the Item column and the long description will be in the description column along with the unit of measure-UOM.

Quantity: You will need to know how much material your job will require. EXAMPLE: If the job requires 2,000 pieces to be cut 1/2 inch long; $1/2 \text{ inch} = .50$. $.50 \times 2,000 = 1,000$ divide by 12 (12 inches = 1 foot) = 83.333. Add a small amount for set-up. 86 feet divide by 2,000 = .043. .043 will be put into the Quantity column. This is the footage it takes to make one piece.

When you put .043 in quantity column and a box pops up and says your quantity contains too many decimal places (see example #2), type in the following: /.IMM (see example #3).

The Inventory Master for this material will come up on the screen, enter all the way thru until a green box pops up, then hit the escape (ESC) button. It will disappear, then enter down to Allow Decimals and Type in 3 (see example #4). Hit enter and you will be back to the B.O.M. Master screen. Your .043 quantity will then be accepted.

NOTEThe components section can list more than one material if the part requires it.

When the above section is completed, press F9-Flip (at the bottom of the screen). Then F5 to add instructions (see example #5). These would include: customers name and sales order number, cut length with tolerance, P.O.'s, drawings, certs, inspections, packaging or any requirements the customer makes on their purchase order.

FACTORY ORDER

Factory Order Path:

D-Production> T-Transaction> F-Factory Order> (see example #1)

Leave Order No. at NEW.

Warehouse: will fill in as 01.

Manf Whse: Type in VA (for value-added).

No of Fact/orders: will fill in as 1.

Auto Issue: will fill as Y. Leave as Y.

Forward Date: Do not fill in anything.

Item: will be the C&M-12345-1 (example). The C&M part number from the beginning order.

Quantity: will be the number of parts requested by customer on there purchase order.

Due Date: will fill in automatically.

Standard Job: Always Y.

Press F2 to save. (see example #2) for the Factory Order Number. Then hit enter and you will be given an Internal Order Number (see example #3). This Internal Order Number will be your Material Requisition for materials needed to complete the job. Now go back to the sales entry screen:

S-Sales> T-Transactions> O-Orders (see example #4)

At Order No enter O (letter O) and the Internal Order Number given at the Factory Order screen. Then at the Reference field, enter customers purchase order number. Enter down to Item and enter until screen looks like example # 5. use the Order Certifications to get the necessary certs per customers request. Also, if your quantity is not a rounded off number(as in the example) go up to, as per example 9 ft (see example #6).

After this screen is completed, press F5 to get the Header Page (see example #7), then press F3 and enter to next line.

Put customers name, sales order number and Factory Order number here (see example #8). It will be the quickest way to identify which order this material belongs to. Then hit the F2 key and you will be taken down to SALES TYPE enter E, then WRITER will always be 01 on material reqs. After you enter 01, a small black screen will pop up. Enter 01 and per cent is 100. Then it enter.

For ORDER TYPE hit I (for internal). Then for TAX EXEMPT is always Y. Tax No will automatically say internal. Enter until you get to Ship Complete and change to N. Enter thru everything else until you get back up to top line.

Press F2 and save. This will take you back to first screen which is already complete. Press F2 to save.

To print factory order:

D-Production> T-Transactions> P-Print worksheet> P-Print See example #1 for the Factory Order Print sheet.

If you have only 1 factory order enter down to FACTORY ORDER NO. and put in F and the number from the factory order screen. If you have several factory orders the enter all the way to the bottom START ORDER NUMBER and put in the first number, the enter down one line to END ORDER NUMBER and enter your last factory number (see example #2).

Press F2 to save and when you are asked which printer chose X for the auxiliary printer (or laser printer #3).

To print sales orders and material requisitions:

I-Inventory> P-Periodic> K-Picking> Q-Picking Queue> O-Order Type
See example #3---All Sales Orders for production will be in the VALUE ADDED SALES.

All material requisitions will be in the INTERNAL ORDERS.

Press F4-Drill Down to get a list of orders. Enter down until you find the order you need to ship.

Then press F7 to Tag Line. When you have tagged everything you need to print, press F2-P/Slips.

Then select P-Print and warehouse printer.

BLANKET ORDERS

Entry path: S sales> M maintenance> O other> B blanket orders> E enter
Enter thru NEW to OUR REF: put in name of inside sales representative. See example 1.

Then enter to CUSTOMER and put in customers account number.

Enter to OUR REF and put in customers purchase order number.

Enter to ITEM and type in customers part number (C&M-12345-1).

If you need to build a part number on this order the NON-STOCK ITEM CREATION screen will appear.

Refer to page 2 for instructions.

Enter to P/SIZE and EA will come up in that cell and enter thru to P/QTY and type in the ordered quantity.

A green screen will appear (see example 2) and ask for DATE: Type in the first scheduled date.

QUANTITY: Type amount of parts required. The schedule will be found on the worksheet from the inside sales rep or the customer will send a schedule of deliveries. Fill in each line of the green screen for date and quantity until you have total amount ordered as scheduled. Press F2 to save. You will then be back to the first screen and you will then type in the price per piece. If there is a second part to be entered, follow the same procedure.

BLANKET ORDER RELEASE

Path: S sales> M maintenance> O other> B blanket orders> R release
First go into the blanket order and make sure the release date and quantity is correct. You can change these at any time if the customer requires different delivery dates. Also, make sure the later scheduled dates are after today's release date. If you do not do this, more than one line will be released.

When you have the BLANKET ORDER RELEASE screen up: ORDER NO: enter the blanket order number.

RELEASE METHOD: leave at N.

HORIZON: change to 0 days. Then F2 to save and you will get a sales order number. Go to S sales> T transaction> O order. Enter in the sales order number. Press F5 to get the header page and follow instructions on page 1 for a regular sales order.

BLANKET ORDER REPORT

Path: S sales> M maintenance> O other> B blanket orders> P report

Screen will have: COMPANY EQUAL TO: leave as INSC

AND CUSTOMER EQUAL TO: put in customers account number

AND ORDER # EQUAL TO: put in the blanket order number

AND ORDER STATUS EQUAL TO: Press F3---choose from 0 if entered, or 1 if partially released, or 2 if fully released, or skip.

To print: P for LPO printer, or X for auxiliary printer (laser printer 3) or S to view on the screen only.

CLOSING A PRODUCTION SALES ORDER

PATH: D-production> T transaction> M confirm manufacture

(See example 1) ORDER NO: put in the factory order number...F1234, for example.

WAREHOUSE, ORDER TYPE, ITEM, ORDER QTY, PREV. QTY, AND Qty MADE will appear on screen after you enter factory order number.

BIN: will always be: X01X01 (This will be chaged when parts are moved into inventory)

BATCH: will be: today's date with year first, then month, then date, followed by 0001. (example: 991220-0001) for first order. Each order after that, the last four numbers will be 0002 for the second order, 0003 for the third order, etc.

Then enter thru STD, COMPLETE, CALC, CLOSE. When the cursor gets back up to QTY MADE, press F2 to save.

Then, go to the sales order. PATH: S sales> T transactions> O orders/bids

Type in the sales order number: (example: O12345)

Enter thru all cells until the B/O says 0 (zero). Enter thru the PRICE cell. Follow same procedure for each line if there is more than one part number on the sales order. Each part number will have its own factory order number. Provided the sales order has not gone to credit hold or pricing hold, it will be in the queue, ready to be printed. For credit hold, call accounts receivable for order release and for pricing hold call manager or supervisor of

sales/customer service. You will get a reminder screen before you save and exit the sales order to tell you if this order is going on credit or pricing hold.

Now, go to the queue. PATH: I inventory> P periodic> K picking > Q picking queue> O order type

Then use the arrow key to arrow down to VALUE ADDED SALES. Press the F4 drill down key to see the list of sales orders. When you locate the one(s) you want to print, arrow the cursor down to the order and press the F7 to tag line.

When you have tagged all the orders you need to print, then press F2 p/slips. You will be asked if you want to print to: screen, auxiliary or printer.

Type in P for printer. Your orders will go to the printer in the warehouse. Now, you will attach the printed order to the paper work in the traveler and have a someone in the shipping department confirm the order.

If the factory order (see above CLOSING A PRODUCTION SALES ORDER) does not release the parts into inventory, then you have to adjust the parts into inventory. PATH FOR THAT IS: I-inventory> Ttransactions>A-adjustments> Q-quantity/Value (See example 2).

DATE: leave as today's date PERIOD: leave as current period REFERENCE: use initials and sales order #

ITEM: is the C&M # (C&M-01234-1) COUNT DATE: today's date

BIN: always X01X01 BATCH: is today's date with year first (000131-0100), if more than one adjustment on today's date, the last 4 digits should be 0101, 0102, 0103, etc.

ON HAND: do not put anything here.

GRN No: will be the year part of the BATCH (000131). QUANTITY: is the number of parts on the factory/ sales order. VALUE: will automatically appear. REASON: to confirm mfg. When the green screen appears, type in: to ship partial or to ship complete, whichever applies.

GENERAL LEDGER ADJUSTMENT ACCOUNT: A/C is 1450 SUB A/C is 3000 C/C is 0000 SUB C/C is 0000. Then press F2 to save. Go to the sales order and enter thru the part number and amount of parts. Now your back-order should be at zero and the sales order will be in the queue to be printed.

POSTING TIME TO PRODUCTION ORDERS

PATH: P production> T transaction> O others> L labor (see example 1)

See example 2 for LABOR TIME SHEET ENTRY

EMPLOYEE: enter employee number from time card

TRAN DATE: date on time card

PERIOD: DO NOT CHANGE.

TOTAL HRS: Add up time on time card, but, only post direct labor to a job. Do not post indirect labor (a four digit number).

PROJECT: Is the factory number (example F1234)

SECTION: Is always 1.

COST CODES: the 3 digit number on the time card. List of codes is on the wall to the left of this desk.

PROJECT HRS: Number of hours on time card for each factory order listed for the day. Total hours on top left of time sheet entry must equal total accumulated on top right of time sheet.

PRODUCTION ORDER COMPLETION

After all orders are confirmed and invoiced, they are sent up to the sales department for filing. The production orders are separated and brought down to this desk. If all completed paperwork is together, remove the staples and go thru each paper to look for any drawings that may be mixed in the papers. Remove these drawings and put in black box on top of the file cabinets upstairs in sales dept. A copy of the order worksheet is kept at this desk. Take that copy and put it in the completed paperwork. See example 1 for PATH:
P production> R reports> C project costs> Q estimated Vs actual quantities (see example 1)

See example 2: COMPANY EQUAL TO: Leave as INSC

AND PROJECT TYPE EQUAL TO: Always type in 1.

AND PROJECT EQUAL TO: Type in the factory order number

Press F2 to accept. Then type X to print on laser printer 3.

To complete the production order: get all paperwork plus the extra copy of the order write-up and the completed job sheet. Staple together and send upstairs to be filed.

Revision Notes

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This document has been changed from Rev 'E' to Rev 'N/C' and re-released because prior changes were not noted here.