

Work Order

A Work Order is used to build a quantity X of an assembly from its Bill of Materials. The result is adding the quantity of the assembly to finished goods, and backflushing (aka downcounting) the quantities of child components from inventory. Note, the BOM can be single or multi-level.

The following will demonstrate the WO process using the BOM for the "Driver Head Assembly" shown below

BoM Builder

AssemblyItemID:
Name:

Child ItemID:	Item Name:	QtyInParent:	
<input type="text" value="Head"/> <input type="button" value="v"/>	<input type="text" value="Slice Not"/>	<input type="text" value="1"/>	<input type="button" value="Delete Line"/>
<input type="text" value="Adjustment Wrench"/> <input type="button" value="v"/>	<input type="text" value="Big Bertha Wrench"/>	<input type="text" value="2"/>	<input type="button" value="Delete Line"/>
<input type="button" value="Add Line"/>			

[Preview/Print Multi-level BOM](#)

Work Order

Work Order (a version of the Sales Order)

Current Invoiceables

Purchase Order

PO List

Buy Direct

Receipts List

Sales or Work Order

SO List

Sell Direct

Ship List

Add Inventory

Subtract Inventory

How Inventory

Select an option from the menu at the left to use cloudMRP fu

Click on the "[How Do I?](#)" button at the left for usage informati

Just getting started? Try the "[Getting Started Guide](#)".

You are currently logged into Company : demo3385

You are currently logged in as : hannah@erplite.com

Click [HERE](#) to [change your password](#).

Work Order

Select "Work Order".....cloudMRP uses, by default, the locaton "MainStore" for all non-defective raw materials and manufactured assemblies. Thus, PO;s receive into Mainstore, SO's ship from Mainstore...and WO's use Mainstore for finished goods.

Sales or Work Order

SO/Virtual WO: * SOTrackingNumber: *optional

ShipTrack#: * CustomerPO: *

Sold To: ShipTo:

Location From:

Status: Notes:

Terms: ShippingMethod:

OrderDate(yyyymmdd):

Customer Taxable: TaxRate%:

ItemID:	Description:	Options:	Quantity:	UnitPrice:	DueDate:	Tax: (BOM):	
<input type="text" value=""/>	<input type="text" value=""/>		<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="button" value="Delete Line"/>

(yyyy/mm/dd)

SubTotal: 0
Taxes: 0
ShippingCharges:
Total: 0.00

Work Order

Fill out Work Order to make quantity 2 of the "Driver Head Assembly"

Sales or Work Order

SO/Virtual WO:	<input type="text" value="Work Order"/>	SOTrackingNumber:	<input type="text"/>
ShipTrack#:	<input type="text"/>	* CustomerPO:	<input type="text"/>
Sold To:	<input type="text" value="MainStore"/>	ShipTo:	<input type="text" value="MainStore"/>
Location From:	<input type="text" value="MainStore"/>	Notes:	<input type="text"/>
Status:	<input type="text" value="Shipable"/>	ShippingMethod:	<input type="text"/>
Terms:	<input type="text"/>	OrderDate(yyyymmdd):	<input type="text"/>
Customer Taxable:	<input checked="" type="checkbox"/>	TaxRate%:	<input type="text" value="0"/>


ItemID:	Description:	Options:	Quantity:	UnitPrice:	DueDate:	Tax:(BOM):	
Driver Head Assembly	Driver Head Assembly		2	500	<input type="text"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Delete Line
<small>(yyyy/mm/dd)</small>							

SubTotal: 1000
Taxes: 0
ShippingCharges:
Total: 1000.00

Work Order

Save Order and Ship (shipping upcounts finished good and downcounts raw materials)

Home	
Current Inventory	Successfully saved SalesOrder.
Current Inventory (Options)	Enter a shipment for this SalesOrder? <input type="button" value="Start Shipping"/>
Transaction History	
Current Invoiceables	
Purchase Order	
PO List	Enter a new SalesOrder? <input type="button" value="New SalesOrder"/>
Buy Direct	
Receipts List	



Work Order

finish shipping

Ship From:

Terms:

Shipping Method:

OrderDate: 2014/12/01 10:59:05
(yyyy/mm/dd)

ShippedOnDate:
(yyyy/mm/dd hh:mm:ss)


Customer Taxable:

Tax Rate: 0%

Additional Notes:

ItemID:	Description:	Options:	Ordered:	PastShips:	ShipNow:	UnitPrice:	DueDate:	Tax:	(BOM):	S
Driver Head Assembly	Driver Head Assembly		2	0	2	500		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

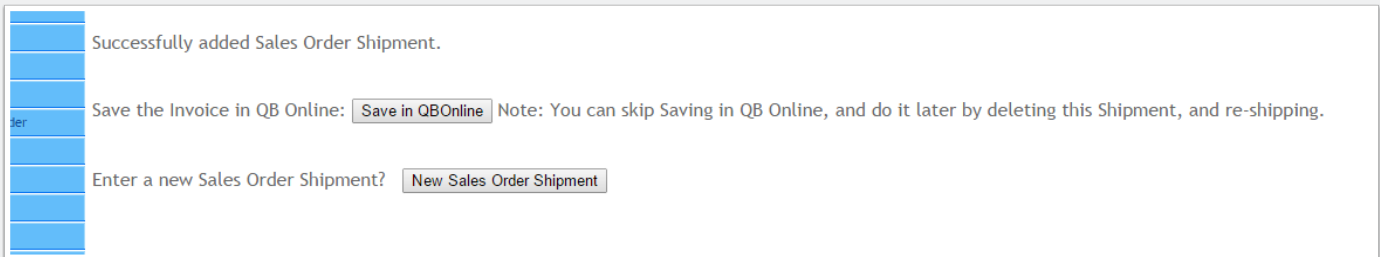
SubTotal: 1000
Taxes: 0
ShippingCharges:
Total: 1000.00



Work Order

The inventory count changes have been done.

Note :: "For use of "Save to QB Online" ...see the "Inventory updates to QBO tutorial".



Successfully added Sales Order Shipment.

Save the Invoice in QB Online: Note: You can skip Saving in QB Online, and do it later by deleting this Shipment, and re-shipping.

Enter a new Sales Order Shipment?

Work Order

Check count changes

There were 5 each of "Adjustment Wrench" and "Head" in inventory before the WO was done. As seen below

1. "Driver Head Assembly" has been upcounted from 0 to 2.
2. "Head" has been downcounted from 5 to 3
3. "Adjustment Wrench" has been downcounted from 5 to 1 (ie 2*2)

Item ID	Item Name	On Hand	Reorder Levels	\$Each	Location
Adjustment Wrench	Big Bertha Wrench	1	0	0	MainStore
CMP0001	CMP0001	3	10	234	MainStore
cmpxy	x=y	5	0	0	MainStore
coffeecup		7	0	0	MainStore
diamonds		7	0	0	MainStore
driver	Big Bertha	1	0	10	MainStore
driver	Big Bertha	-2	0	10	Rory MacRoy
Driver Head Assembly	Driver Head Assembly	2	0	0	MainStore
greenpen	COOL green pen	8	0	2	MainStore
Head	Slice Not	3	0	200	MainStore
pucks		6	0	0	MainStore
ShoeFrontLeft		5	0	15	MainStore

Verify Count changes via Transaction History

If you need to verify the transactions (and resultant count changes) done by the WO, then use "Transaction History" on the Main Menu, ClouMRP transactions downcount the FROM (1) location and upcount the TO (2) location.

Sell/Ship	1752	-	2014/12/01 10:59:05	Adjustment Wrench	Child Items of Driver Head Assembly Bill of Materials from SOTracking# and the SOTransactionID: 1751			4	MainStore 1	2
Add	1753	-	2014/12/01 10:59:05	Driver Head Assembly	Finish Goods Driver Head Assembly for BoM from SOTracking# and the SOTransactionID: 1751			2		MainStore
Sell/Ship	1752	-	2014/12/01 10:59:05	Head	Child Items of Driver Head Assembly Bill of Materials from SOTracking# and the SOTransactionID: 1751			2	MainStore	
Sell/Ship 3	1752	-	2014/12/01 11:04:36	Driver Head Assembly	Driver Head Assembly			2	MainStore	MainStore

Work Order

The Work Order Records

In the transaction list above, the bottom most record (3) (where the FROM TO locations are the same) is the core WO record. Click on 1752 to see the WO . Note that to simplify cloudMRP (vs our desktop product ERPlite Pro), we have used the Sales Order process and documents for dual purpose (SO and WO). Thus, transactionID 1752 shows a "Packing Slip" documenting the WO to make 2 "Driver Head Assemblies" The WO number 1751 is listed as the SOTransactionID. (In the SO List from the Main Menu, the WO is labelled TransactionID 1751)

Packing List

Ship To: MainStore ,	Invoice To: MainStore ,
Ship From: MainStore ,	<u>SO TransactionID:</u> 1751 <u>SO TrackingNumber:</u> <u>Invoice TransactionID:</u> 1752 <u>Invoice Number:</u> <u>CustomerPO:</u> <u>OrderDate:</u> 2014/12/01 <u>ShipDate:</u> 2014/12/01 <u>Shipping Method:</u> <u>ShipTrack:</u>

Additional Notes:

ItemID:	Description:	UnitsToShip:	Serial#:	Bin Location:
Driver Head Assembly	Driver Head Assembly	2		