

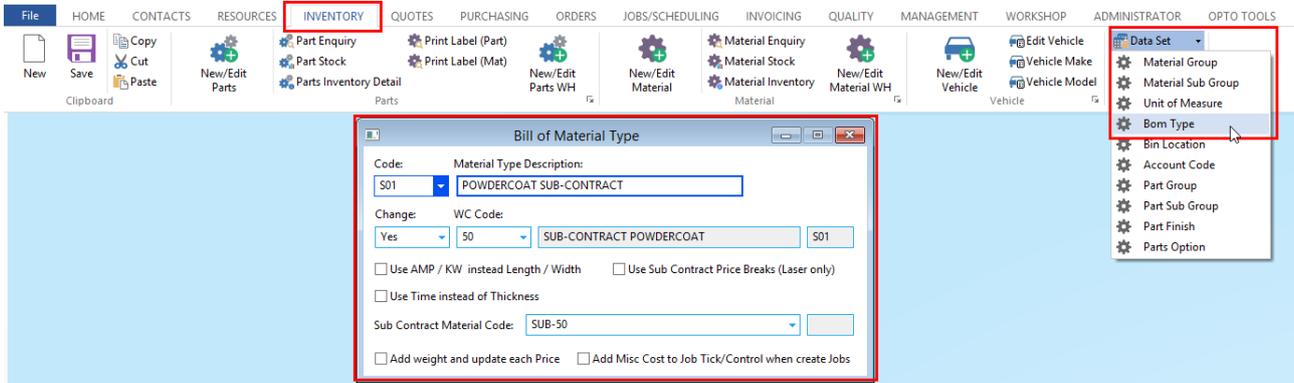
2006-111 - Automated Sub Contract Purchasing Set-up

Overview:

Sub Contract services can be managed through OPTO 'Sub Contract Purchasing'. To correctly operate the purchasing and management functions there are a number of parameters that must firstly be set up. Sub contract operations are purchased against the job number and are not purchased into stock for 'picking'.

Create a new 'Bill of Material Type'

From the OPTO ribbon, select the 'Inventory' tab and **click** on the 'Data Set' drop menu then **click** on 'Bom Type' and add a new code for each Sub contract operation required and set parameters as shown. **Press <F9>** to save.



Create a New Workcenter

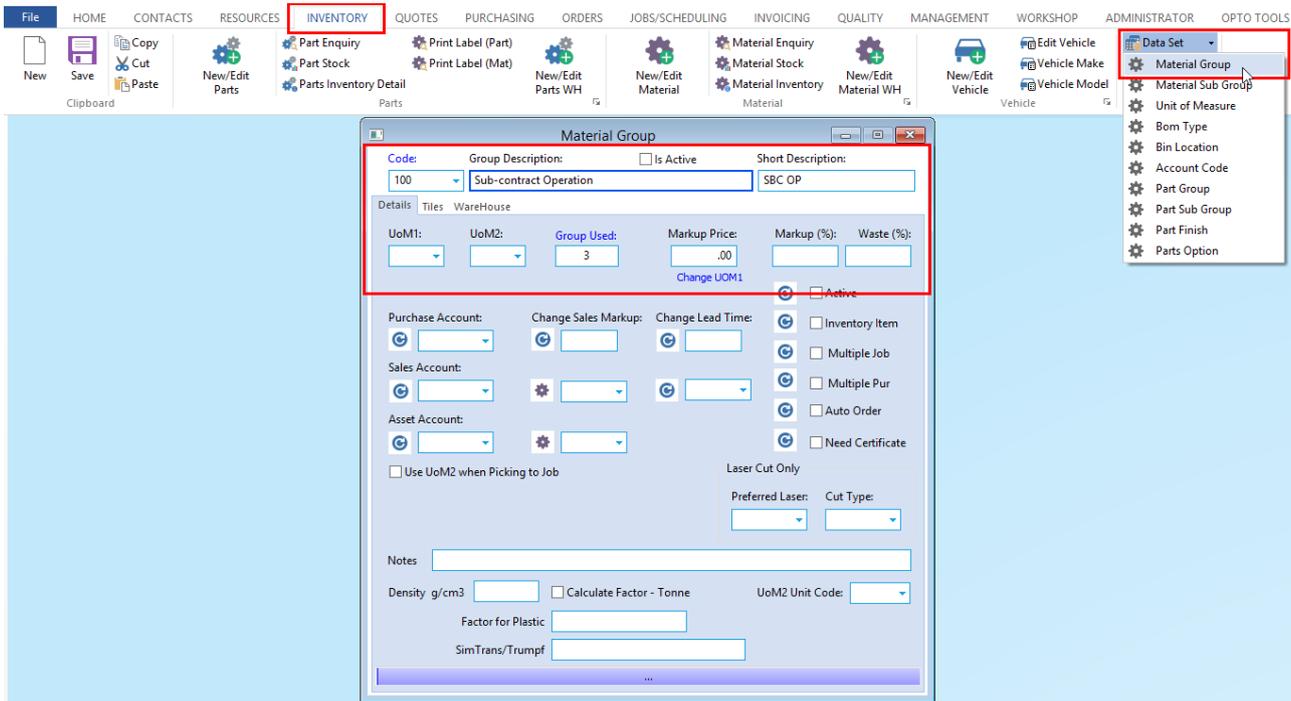
From the OPTO ribbon, select the 'Resources' tab then **click** the 'New/Edit Workcenter' icon to begin creating a new Workcenter for the specific Sub contract operation. Enter a number in the **Code** field then **press <TAB>** and enter a description in the **Description** field, edit other options as necessary. **Press <F9>** when finished to save.

The screenshot displays the 'Workcenter Details' dialog box in the OPTO software. The 'Code' field is set to 50, and the 'Description' field contains 'SUB-CONTRACT POWDERCOAT'. The 'Short Desc' field is 'SBPC'. The 'Workcenter Options' section includes several checkboxes, with 'Sub-Contract Only, Internal Only' checked. The 'Days Lead' is set to 4, and the 'BOM' dropdown is set to 'S01'. A 'Bill of Material Types' dialog box is overlaid on top, showing a table with the following data:

	Code	Description	Change	SubContract Mat C	Mat	WC
1	M	MATERIAL	No			
2	P	PARTS	No			
3	S01	POWDERCOAT SUB-CONTRACT	Yes	SUB-50		S01
4	S02	HEAT TREAT SC	Yes			
5	S03	ZINCPLATE SC	Yes			
6	S04	GALVANIZE SC	Yes	SUB-40		S04
7	W	WEIGHTWEIGHT	No			

Create a New Material Group Record

To be able to track the sub-contract category within OPTO a new 'Material Group' will need to be created for sub-contract operations. From the OPTO ribbon, select the 'Inventory' tab then **click** on the 'Data Set' drop menu and **click** 'Material Group' to create the material group. The user needs only to complete the fields circled below, there is no need to fill any other fields on this window. **Press <F9>** to save.



Create a New Supplier Record

From the OPTO ribbon, select the 'Contacts' tab and **click** on the 'New/Edit Suppliers' icon to open the 'Supplier' window. Create a supplier record for the sub-contract, enter the contact details and address, ABN, etc. Ensure the **Active** box is ticked; **press <F9>** to save.

Create a New Material

From the OPTO ribbon select the 'Inventory' tab then **click** on the 'New/Edit Material' icon to open the 'Material' window. Create a new Material record for the Sub-contract category. **Press <F9>** to save.

Supplier Code	Sup Mat Code	Supplier Description	Date Price	UoM 1 Price	UoM 2 Price	Pref.	QPrf
SUBCON1_1	SUB_POWDER	Subcontract Powdercoat		.0000		Yes	Yes
SHIMMET	SUB_POWDER	Subcontract Powdercoat	11/08/15	30.0000		No	

Now that the codes and records has been set-up, the sub contract operations and materials can be used when building parts.

Parts Bill of Material - Adding Sub Contract operations

en the 'Part Details' window and build as shown below. Add the materials as normal and then add the sub-contract

Dbi- click on the **Qty** column to open the 'Add Supplier Info' window and add details as required.

Note: the WC column should be populated automatically (if not, then the parameters in all the windows shown previously are not set up correctly)

Open the 'Labour' tab on the 'Parts Details' window to add the workcenter codes and any descriptions. Ensure that you add the operations in order that they generally occur.

The screenshot displays the 'Parts' window in a software application. The 'Build' tab is selected, showing a table with columns: T, Build, Description, U, @, Length, Width, Qty, WC, Info. The 'Qty' column for row 2 is highlighted, and an 'Add Supplier Info' dialog box is open over it. The dialog box contains a table with columns: Supplier Code, Pref, Unit Price, Last Date, Quote No. The entry '1 SUBCON1' is selected. The 'Parts' window also shows a 'Labour' tab with a table of workcenter details.

T	Build	Description	U	@	Length	Width	Qty	WC	Info
1	M	OPTO.0-1200-24001111	MS Sheet 5.00mm x 1200 x 2400	SHT			2.0000	30	
2	S01	OPTO50					.0000	50	

WC	WC Description	Work Description	Set (Mins)	Pro (Mins)	Pro (HRS)	R	Text	Lead	M
50	SUB-CONTRACT POWE	Powdercoat - Colbalt Blue	1.00	4.00				4	

Press <F9> to save.