# 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.

File HOME CONTACTS RESOURCES	INVENTORY QUOTES PURCHASI	ING ORDERS JOBS/SCHEDULING	INVOICING QUALITY	MANAGEMENT WORKSHOP AD	MINISTRATOR OPTO TOOLS
New Save Clipboard	Rart Enquiry Rint Label (Part) Part Stock Rint Label (Mat) Parts Parts	New/Edit Parts WH	Material Enquiry Material Stock Material Inventory Material WH	New/Edit Vehicle Vehicle Make Wehicle Model Vehicle Model Vehicle Fig	Data Set  Material Group  Material Sub Group  Unit of Measure
	Code: Material Tyg S01  POWDERC Change: WC Code: Ves  S0 Use AMP / KW instead L Use Time instead of Thic Sub Contract Material Code Add weight and update e	Bill of Material Type pe Description: COAT SUB-CONTRACT  SUB-CONTRACT POWDERCOAT ength / Width Use Sub Contract F kness i SUB-50 each Price Add Misc Cost to Job Tick	S01 Price Breaks (Laser only)		Bom Type     Bin Location     Bin Location     Account Code     Part Group     Part Sub Group     Part Finish     Parts Option

### **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 descripting in the **Description** field, edit other options as necessary. **Press <F9>** when finished to save.

File	HOME CONTACTS RESOURCES IN	IVENTORY QUOTES PURCH	ASING ORDERS JOBS/SC	CHEDULING INVOICING
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	Workcer	nter Details		
	Code: Description:	RCOAT	Short Desc:	
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	Charge (All):         1.5000         90           Charge (Setup):         ✓         .2333         14	.00 Non Productive Workce Consecutive Multi Jobs .00 Do not Schedule	inter, Leave or KDO	
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	Cost (Workcenter): 1.1920 71	.52 Days Lead 4	BOM S01 -	
	Co	Bill of Material T	ypes	×
	Code         I           Work         1         MATERIAL           2         P         PARTS	Description Chan No No	nge SubContract Mat C	Mat WC
	Grou Gr	-CONTRACT Yes Yes Yes Yes No	SUB-50 SUB-40	S01 S04
		<u>OK</u> <u>C</u> ancel <u>S</u> earch	h <u>P</u> rint	

## **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.

File         HOME         CONTACTS         RESOURCES         INVENTO           Image: Save Save Clipboard         Image: Save Save Save Save Save Save Save Save	RY QUOTES PURCHASING ORDERS JOI y Print Label (Part) Print Label (Mat) tory Detail Parts Parts Purchasing Orders Joi New/Edit Parts Purchasing Orders Joi Purchasing Orders Joi Pu	S/SCHEDULING INVOICING QUALITY M. Material Enquiry Material Enquiry Material Inventory Material Inventory Material WH Material WH Material	ANAGEMENT WORKSHOP A Rew/Edit Vehicle Vehicle Vehicle Make Wehicle Model Vehicle file	DMINISTRATOR OPTO TOOLS
	Material Grou Code: Group Description: 100 Sub-contract Operation Details Tiles WareHouse UoM1: UoM2: Group Used:	Is Active     Short Description:       Is Active     Short Description:       SBC OP     SBC OP         Markup Price:     Markup (%):     Waste (%):       .00		<ul> <li>Born Type</li> <li>Bin Location</li> <li>Account Code</li> <li>Pat Group</li> <li>Part Sub Group</li> <li>Part Sub Group</li> <li>Part Finish</li> <li>Parts Option</li> </ul>

### **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.

Supplier - SUB-CONTRACT POW	DERCOAT	
Supplier Code: SUBCON1_1	Supplier Name: \$UB-CONTRACT POWDERCOAT	Tax Code: 🖉 6 🗣 GST
Details Supplier Info More Info	Purchases Delivery Materials Financial Hist Notes QMS	
Date Entered: Phone No:	Fax No: Employee Name: Sub Contract	✓ Is Active
06/08/2010	2 V Larry Moreton	QA - Approved

### **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.

File HOME CONTACTS	RESOURCES INVENTORY	QUOTES PURCHAS	ING ORDE	RS JOBS/SCHED	ULING INVOICING
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	Materia				- • •
Material Code: SUB_POWDERCOAT Details Allocation History More	Material Description: Subcontract Powdercoat	ivoices Financial Hist N	otes	Rev:	Date Entered: 🥟 25/07/2012
Active Inventory Ite Fill to Maximum Auto Order Material Group: 100 V Sup-contract Opera	m Actual Purchase in Multiple Job Group Qty in Multiple Bom T: Multiple Length V 1 - 1.0000	Dummy Pre Ord	ler Emp: :: Volume:	: 32 - Larry Pur U UoM 1: UoM 2: EACH -	Moreton JoM 2 Thick Lead/T: .00 1
Supplier Code Sup Mat Cod SUBCON1_1 SUB_POWDEI SHIMMET SUB_POWDEI	e Supplier Desci R Subcontract Powdercoat R Subcontract Powdercoat	iption	Date Price 1	UoM 1 Price UoM 2 .0000 30.0000	Price Pref. QPrf Yes Yes No
Sub Material Group 100  Vild Steel 5.00mm Spacing: Border:	Inventory On Hand: .0000 Bin Location:	Purchasing Min Order: Max Level:	.0000	UOM Conver UoM2 > UoM Margin .00	rsion Factor
Last Purchase Price           \$.0000         0%           25/07/2012	Allocated: .0000 .0000	Reorder Level: Stock Type:	.0000	Sell Price Account Det	ails
\$.0000 Std Price:	0 Available: .0000	To Order:	.0000	Asset Acc:	· · ·

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

**Dbl- 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.

File	HOME CONTACTS	RESOURCES INVENTO	RY QUOTES PURCHA	SING ORDERS	JOBS/SCHEDULING INVOICING
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New	Save Cut	New/Edit	🐔 Print Label (Mat	New/Edit	New/Edit
	Paste	Parts Parts Inven	tory Detail	Parts WH	Material Material Inventory
	Clipboard		Parts	12	Material
			Parts		
	Part Code:	Part Description:			Finish: Date Entered:
	SUBCON-TEST	SUB-CONTRACT	TEST		
	Details Build Labour Mo	re Info Allocation History L	Jsed In		
					Alt
	T Build	Description	n U @	Length Width	Qty WC Info
	2 S01 OPTO50	MS Sheet 5.00mm x 1200	x 2400 SHI	×	.0000 50
	•	Add :	Supplier Info		
		Supplier Code	Pref Unit Price Last Date	Quote No	
	<u>1 SU</u>	BCON1	Yes 35.0000 01/06/10		
		🕞 ОК	😣 Close		
		Passada			
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💷 Par	ts				
Part C	Code:	Part Description:		F	inish: Date Entered:
SUB	CON-TEST -	SUB-CONTRACT TEST			✓ 06/08/2010
Detai	ls Build Labour More Info	Allocation History Used	In		
50 WC	WC Description	Work Desc	ription	Set (Mins) Pro (	Mins) Pro (HRS) R Text Lead M
1.1.1		cout - conduit brac		1.00	4.00 4

Press <F9> to save.