## **Complete Individual Processes in a Job**

## **Overview:**

This document demonstrates how to complete an individual process in a job where employees have forgotten to choose '*Yes*' for a completed job when clocking off of a job – Especially useful where there are multiple sub parts and numerous job tickets on the one job.

From the OPTO ribbon, select the 'Orders' tab and **click** on the 'Process Sheet (Factory)' icon. In the **Order No** field **press** <F2> and select the order from the pop-up list then **click** on <u>OK</u>. **Click** on the 'View this Job' button, to display the 'CURRENT Job' window.

| File | HOME              | CONTACTS | RESOU                    | RCES INVENT   | TORY QUOTES  | PURCHASING  | ORDERS                  | JOBS/SCHEDULING                           | INVOICING            | QUALITY MA   | NAGEMENT   | WORKSF  |
|------|-------------------|----------|--------------------------|---|--|---|-------------------------|---|----------------------|--|--|---|
| New  | Save<br>Clipboard | Copy     | New Sales<br>Order       | Edit Sales<br>Despatch<br>Process Sł  | Order 🛛 🛃 H<br>(Sales) 🔤 C<br>heet (Sales)<br>Sales Order  | listory Sales Orders<br>ancel Sales Order                                 | Callup Sheet<br>(Sales) | Point<br>of Sale<br>Point of Sale         | New Factory<br>Order | Edit Factory Or<br>Despatch (Fact<br>Process Sheet | rder 📮 C<br>:ory) 📑 H<br>(Factory) 📮 C<br>Factor | heck Alloca<br>list Factory (<br>ancel Factor<br>y Orders |
|      |                   |          | III<br>III<br>III<br>Pro | Process Sheet (Fac<br>der No: Job<br>190  Control: N<br>oduction Steps  C<br>iew the Costing<br>View This Job | tory Order)<br>Type: Div: C<br>PR 1 E<br>IO COST PART SUBS<br>Despatch, Invoices an<br>View Individu | lient Code:<br>BADGER<br>ITUTION<br>d History Transfer<br>Jal Job Set Sta | atus To Complete        | Indo Complete                             | × •                  |  |  |   |
|      |                   |          | NC                       | Despatch<br>Despatch  | Invoicing<br>Create  | Invoice Edit  | Invoice<br>nt Invoice   | Send To History Send To History GREQUIRED |                      |  |  |   |

**Dbl-click** on the **WC** (workcenter) field (circled below) where the process is required to be completed. This will open the 'Job Tickets Containing' window.

| Order Amount:         \$4.00           Labour Cost:         \$0.00           Labour Cost:         \$0.00           Material Cost:         \$0.00           Part Stock Cost:         \$0.00           Profit:         \$4.00           Wc Descripti         Est (H)           Use Est (H)         Use (H)           Cost Q2.80         \$0.00           \$0         \$0           \$0         \$0           \$0         \$0   | CURRENT Job - 1189 | )       |          |                              |              |                     |             |                        | -                             |                        |
|--|--------------------|---------|----------|------------------------------|--------------|---------------------|-------------|------------------------|-------------------------------|------------------------|
| Labour Cost:         \$.00           Material Cost:         \$.00           Part Stock Cost:         \$.00           Profit:         \$4.00           Wc         Wc Descripti         Est (H)         Use Est (H)         Cost         Q.Rate         Quote         C-Rate         Charge - A         Charge - B         Use Est cost           Wc         Wc Leave         .00         22.80         000         \$.00         \$.00         \$.00  | Order Amount:      |         | \$4.00   | Charge A + N<br>Charge B + N | Nat:         | \$.00 +<br>\$.00 +  | (           | \$.00 ) =<br>\$.00 ) = | \$.(<br>\$.(                  | 00                     |
| Material Cost:         S.00           Part Stock Cost:         S.00           Profit:         \$4.00           Def Markup:         1.50           Job Markup:         1.50           Job Markup:         1.50           Wc Descripti         Est (H)           Used (H)         Cost           Q2.80         .00           S.00         S.00           S.00         S.00 | Labour Cost:       |         | \$.00    | Use Est + Ma                 | t: (         | +                   |             | ) =                    |                               |                        |
| Manual entered Charge         Manual entered Charge         Manual entered Cost         Estimated Time:         .00           Profit:         \$4.00         Def Markup:         1.50         \$.00        22.80        22.80           Wc         Wc Descripti         Est (H)         Used (H)         Cost         Q.Rate         Quote         C-Rate         Charge - A         Charge - B         Use Est Cost           1000         \$ick Leave         .00         2.30         .00         \$.00         .00         \$.00         \$.00   | Material Cost:     |         | \$.00    |                              |              |                     |             |                        |                               |                        |
| Profit:         \$4.00         Def Markup:         1,50         Job Markup:         1,50         Diff:           \$.00         \$.00         \$.00         \$.00         \$.00         \$.00         \$.00           Wc         Wc Descripti         Est (H)         Used (H)         Cost         Q-Rate         Quote         C-Rate         Charge - A         Charge - B         Use Est Cost           1000         \$ick Leave         .00         22.80         .00         \$.00         \$.00         \$.00         \$.00   | Part Stock Cost:   |         | \$.00    | Ma                           | nual entered | l Charge N<br>\$.00 | lanual ente | s.00                   | Estimated Time:<br>Used Time: | .00<br>22.80<br>-22.80 |
| S.00         S.00         S.00         S.00           Wc         Wc Descripti         Est (H)         Used (H)         Cost         Q.Rate         Quote         C-Rate         Charge - A         Charge - B         Use Est Cost           1000         Sick Leave         .00         22.80         .00         S.00         .00         .00         S.00   | Profit:            |         | \$4.00   | Def Marku                    | ip: 1.50     | Job Mar             | kup: 1.50   | )                      | Diff:                         |                        |
| Wc         Wc Descripti         Est (H)         Used (H)         Cost         Q-Rate         Quote         C-Rate         Charge - A         Charge - B         Use Est Cost           1000         Sick Leave         .00         22.80         .00         S.00         .00         S.00         .00         S.00  |                    |         |          | \$.00                        |              | \$.00               |             |                        |                               | \$.00                  |
| 1000 Sick Leave .00 22.80 .00 S.00 .00 S.00 .00 S.00 .00 S.00  | Wc Wc Descripti    | Est (H) | Used (H) | Cost                         | Q-Rate       | Quote               | C-Rate      | Charge - A             | Charge - B                    | Use Est Cost           |
|  | 1000 Sick Leave    | .00     | 22.80    | .00                          | \$.00        | .00                 | \$.00       | .00                    | .00                           | \$.00                  |

Dbl-Click on the Part Description column to open the 'Process Control' window.

| <b></b> J | ob Tickets Containing Sick Le | ave |                  |      |         |          |       |              |        |
|-----------|-------------------------------|-----|------------------|------|---------|----------|-------|--------------|--------|
| Sic       | k Leave                       |     |                  | Min  | Est T   | ime<br>0 | Used  | Time<br>1368 | =      |
|           |                               |     |                  | Hour | s       | .00      |       | 22.80        |        |
|           | Part Code                     | Lev | Part Description |      | Est (H) | Used     | d (H) | Comp         | Ticks  |
| 1         | MISC_TEST                     | 1   | MISC TEST        |      | .00     |          | 22.80 |              | 1189-1 |
|           |                               |     |                  |      |         |          |       |              |        |

## Click in the *Finished* field (circled below) and enter "No", then **press** <F9> to save.

| Job Ticket: Workcenter: |                             |                      | Finished: | Step Fin<br>1 No | Used Tir                           | ne                                  | Sch St               | art Date:            | Time             | Est: Qf  | ty Req:         |         | 1        | Ę        |       |    |   |
|-------------------------|-----------------------------|----------------------|-----------|------------------|------------------------------------|-------------------------------------|----------------------|----------------------|------------------|----------|-----------------|---------|----------|----------|-------|----|---|
| Client Code:            |                             | Code: ITMS           |           |                  |                                    | FAI: Nes                            | Nesting No:          |                      | Sch Finish Date: |          | Q<br>Time Used: |         | ty Done: |          | 0     |    |   |
| Part Co                 | de:                         | MISC_T               | EST       |                  |                                    |                                     | No                   |                      |                  |          |                 | 130     | i8 Qty   | Reject:  |       | 0  |   |
| )etails                 | Sche                        | ł                    |           |                  |                                    |                                     |                      | Part Desci           | iption:          | IVIISC   | . 1631          |         |          |          |       |    |   |
|                         |                             |                      |           |                  |                                    |                                     |                      | C Time e             | Used             | 1        | - wc            | EMP     | Charge   | NT       | 1 1/2 | DT | 0 |
| Emp                     | Emp                         | Name                 | A/S       | Step             | Start Date                         | Finish Date                         | S-lime               | r-time               | Useu             | -        |                 |         |          |          |       |    |   |
| Emp<br>5                | Emp<br>Lisa LE\             | Name<br>VINS         | A/S       | Step             | Start Date<br>12/03/18             | Finish Date<br>12/03/18             | 07:00:00             | 15:06:00             | 456              | 30       | .000            | 0000. 0 | .0000    | 486      | 0     | 0  |   |
| Emp<br>5<br>5           | Emp<br>Lisa LE\<br>Lisa LE\ | Name<br>VINS<br>VINS | A/S       | Step             | Start Date<br>12/03/18<br>13/03/18 | Finish Date<br>12/03/18<br>13/03/18 | 07:00:00<br>07:00:00 | 15:06:00<br>15:06:00 | 456<br>456       | 30<br>30 | .000            | 0000.00 | .0000    | 486<br>0 | 0     | 0  |   |

Return to the 'Job Tickets Containing' window and **click** the 'Process' icon (circled below) to update the record.

| Job Tickets Containing Sick L | .eave    |                               |              |                   |                   |                          |                 |
|-------------------------------|----------|-------------------------------|--------------|-------------------|-------------------|--------------------------|-----------------|
| Sick Leave                    |          |                               | ] Mir<br>Hou | Est T<br>ns<br>rs | lime Use          | ed Time<br>1368<br>22.80 |                 |
| Part Code 1 MISC_TEST         | Lev<br>1 | Part Description<br>MISC TEST |              | Est (H)<br>.00    | Used (H)<br>22.80 | Comp                     | Ticks<br>1189-1 |