VERSION 1.0

AUGUST 16, 2018

Apps for Greentree

CUSTOM ASSEMBLY SALES MANUFACTURING

APP NUMBER: 010053

Powered by:

MYOB Greentree

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FEATURES

1. **Create new manufacturing assemblies at Sales Order Entry.**

   Useful if you regularly get orders to manufacture a new product and want the ability to record all the details direct from Sales Order Entry.

   This App automates the creation of the new finished good into inventory and creates the base Bill of Material, then a factory order which is linked back to the Sales order - straight from the Sales Order screen, saving you valuable time.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

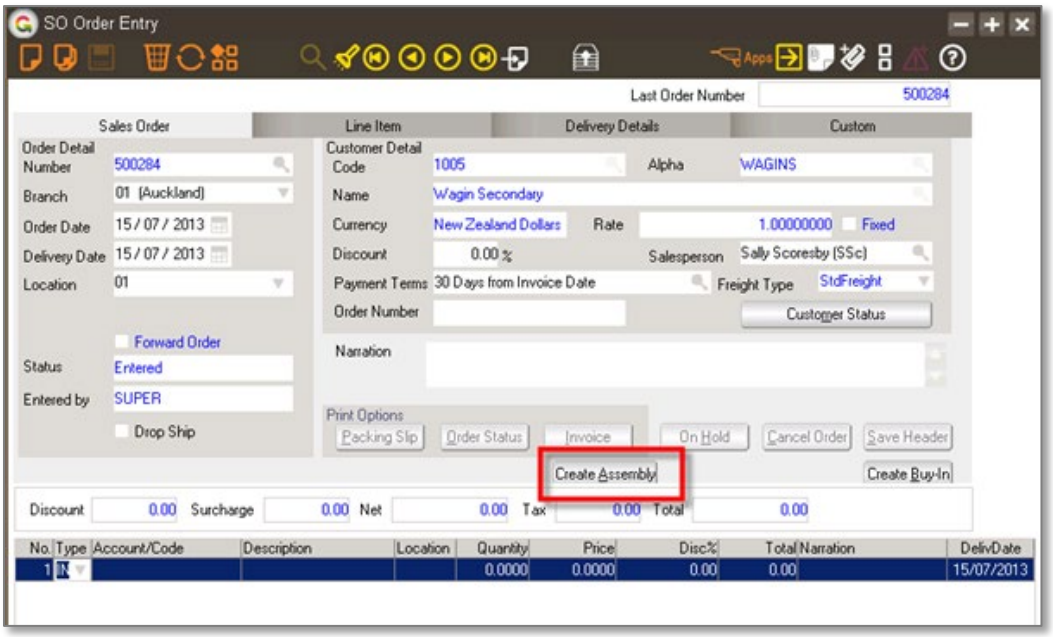
Greentree Modules: Inventory, Sales Orders, Manufacturing, SO/FO Linking

Associated Apps: None.

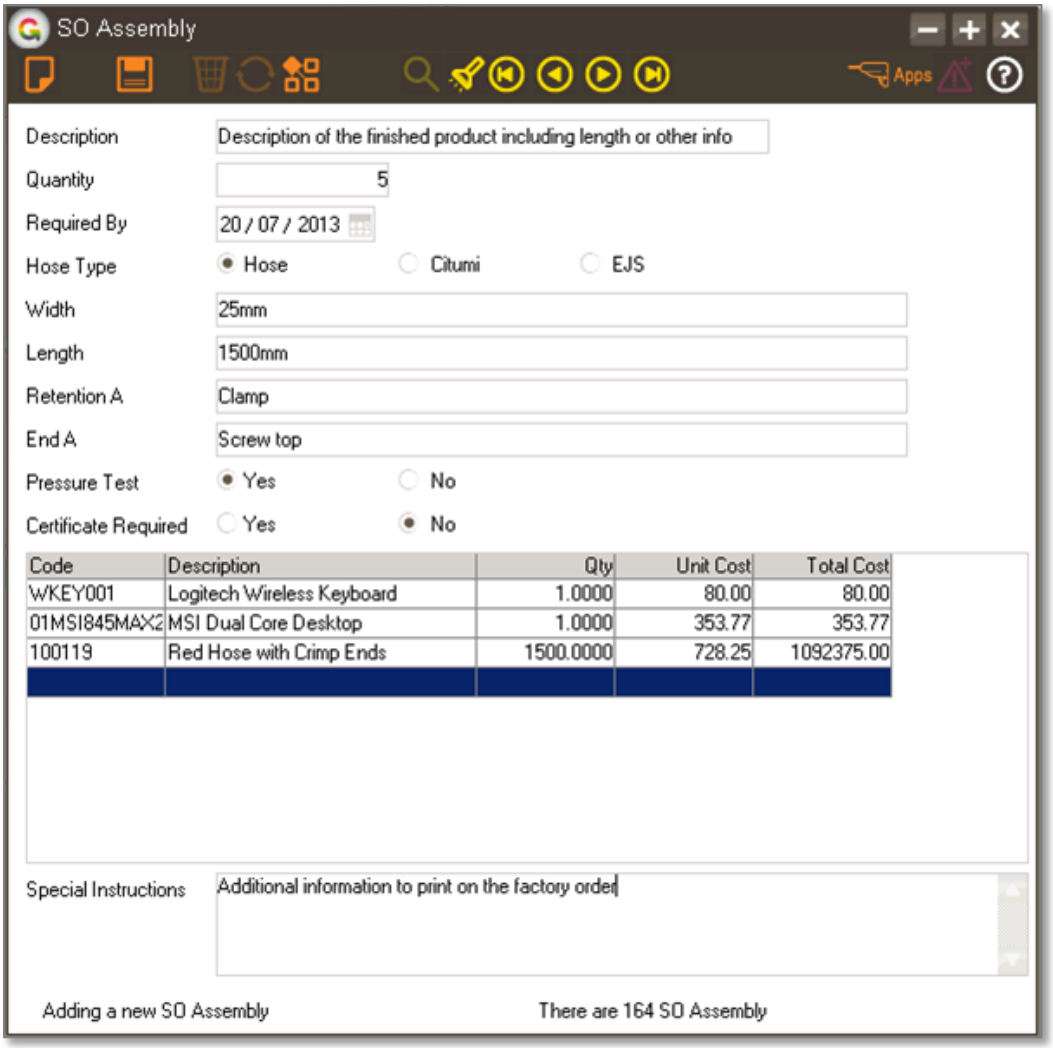
SALES ORDER ENTRY

Use the following process to create a Sales Order, Stock Item, Bill of Material and Factory Order for a new product that needs to be made.

1. Select the menu item | Data Entry | Sales Orders | Sales Order Entry |
2. Complete the sales order header
3. Click on the Create Assembly button



4. Complete the SO Assembly form, to set up the new Inventory Item



Description	Enter a Description for the item
Quantity	Enter the quantity of the item to be manufactured
Required By	Enter the date the item is required – this goes onto the Factory Order
Other Information	You can then have as many prompts as are required depending on the type of product to be manufactured. Information can be in the form of text, drop down boxes or radio selections – this information is available to print on the Factory Order. Refer to the setup section for details.

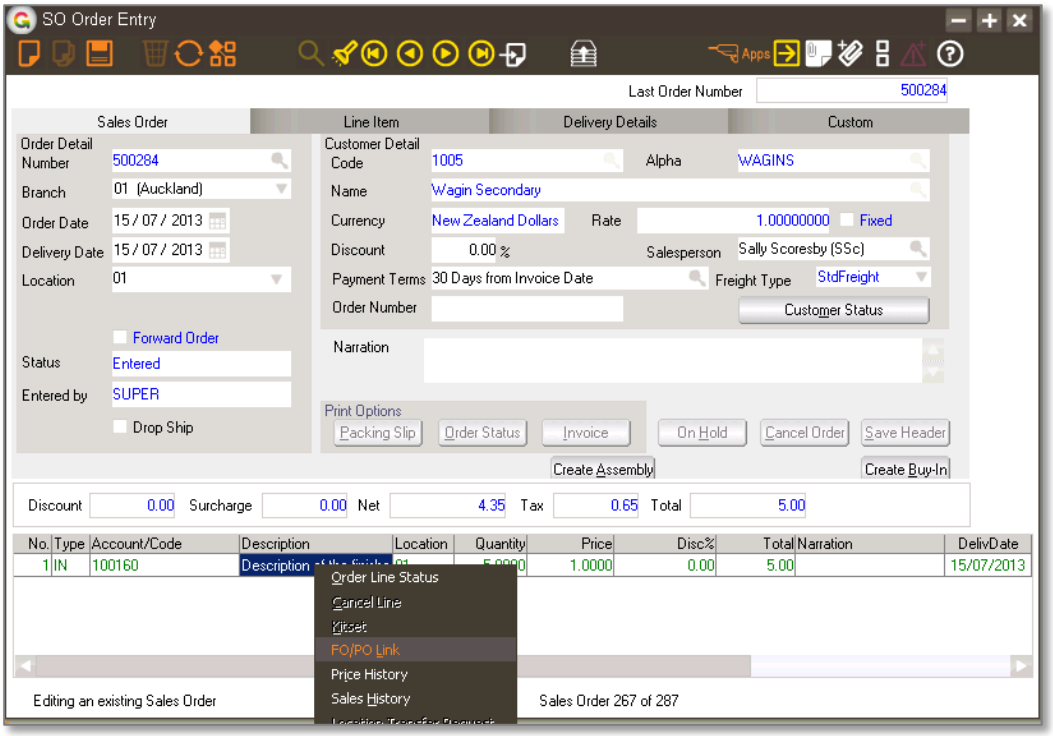
Components

Code	Select the existing stock items that are to be used in the manufacture of the finished good.
Qty	This is the quantity requried to make a single item – it is put onto the Bill of Material.

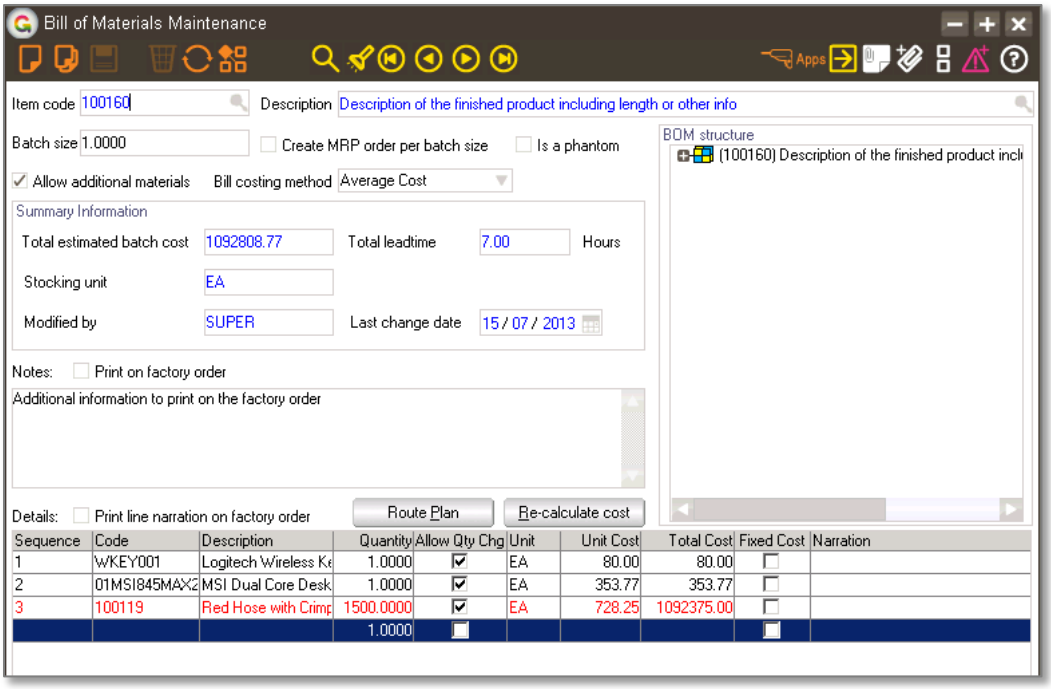
Unit Cost This will default from inventory. Total cost is then displayed.

5. Click the Save button.

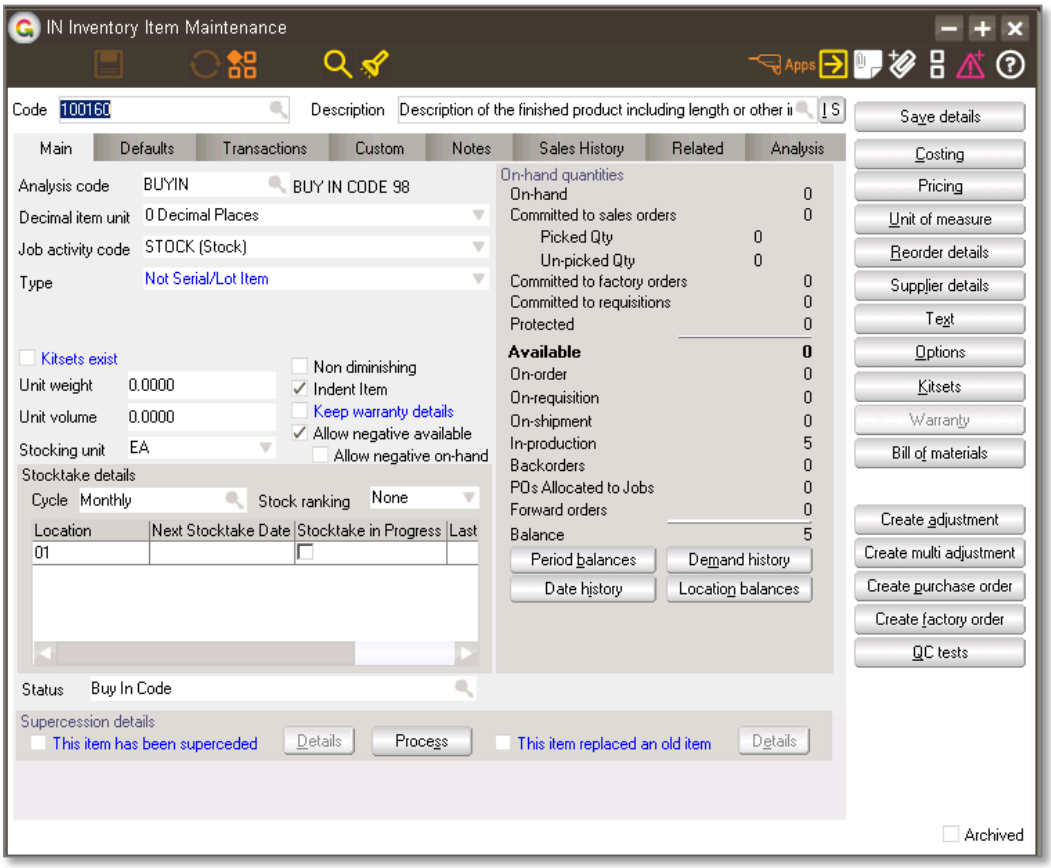
The SO Assembly screen will close and a new Inventory line will be added to the the Sales Order using the data entered.



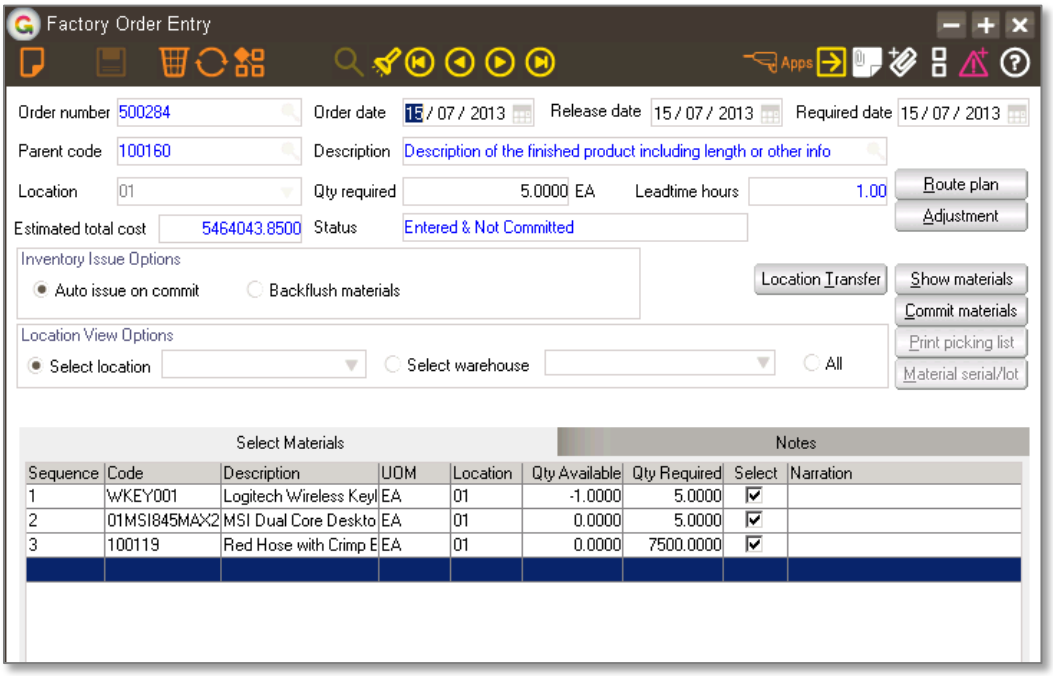
Note: The App has automatically created the Inventory Item, the Bill of Materials and the associated Factory Order



All items are added to the Bill of Material allowing for quantity change and the Bill itself allows additional materials



The analysis code, status and tree assignment for the new item come from Apps Module Control – refer to the setup section.



The Factory order will have the same number as the Sales Order and can now be processed as usual.

6. Continue adding Items to the order as required. Save when ready.

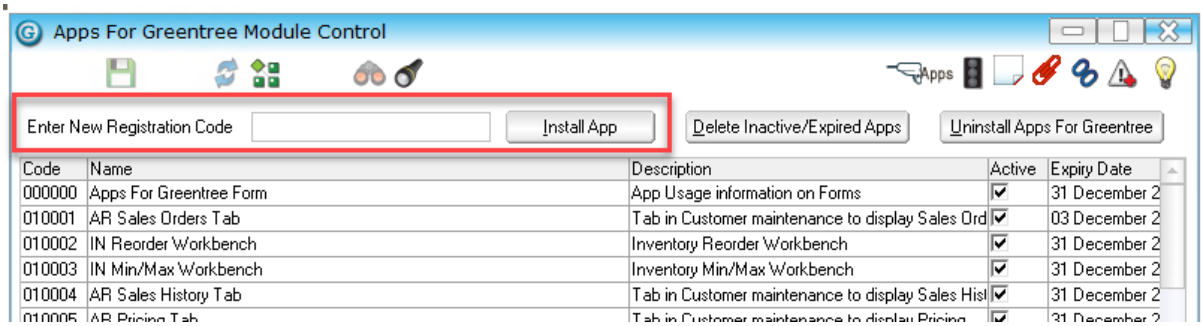
Note: Standard SO/FO linking applies if in use, meaning that the Sales Order will be updated when the Factory Order is receipted, the Sales Order line will be On Backorder.

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the Custom Assembly Sales Manufacturing App.
5. Click on the Edit Users button and select the users who will be configured to use Custom Assembly Sales Manufacturing, for which companies.
6. Save and Close the form.

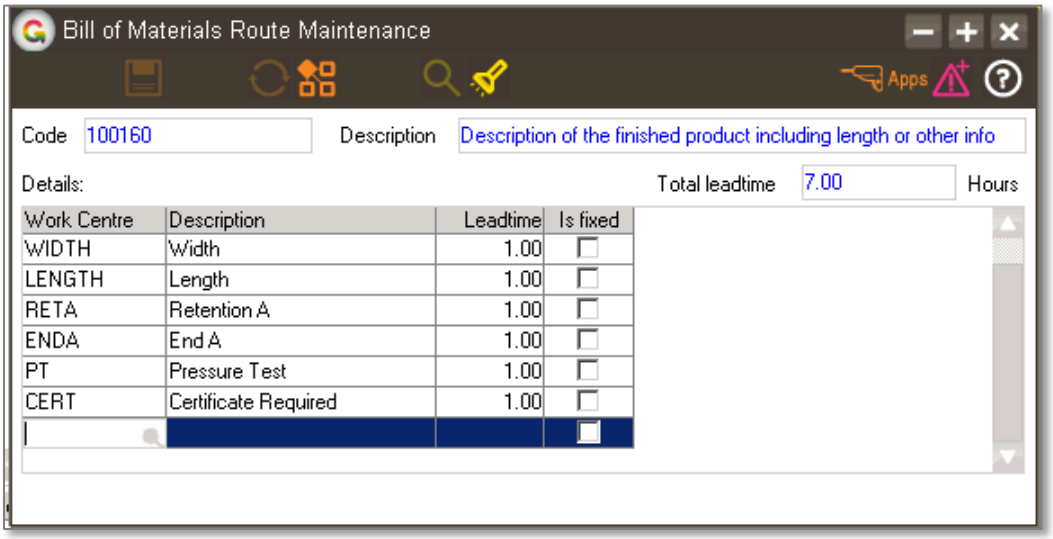
OTHER GREENTREE CONFIGURATION

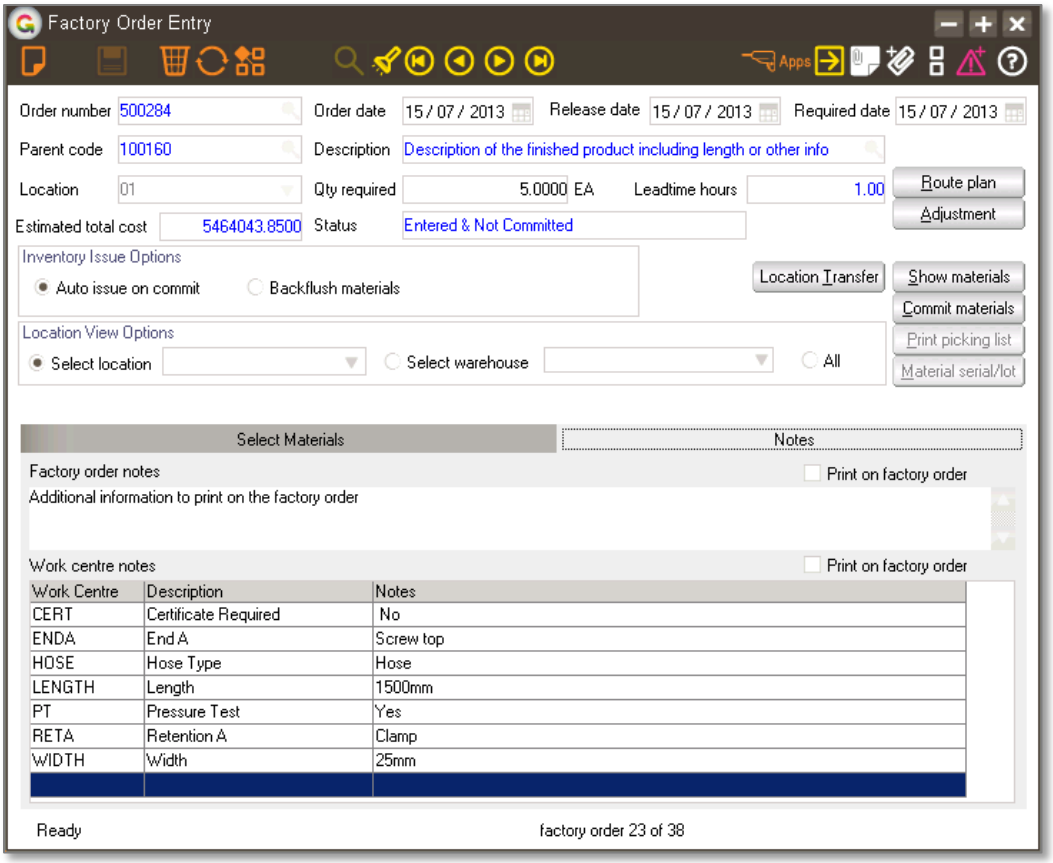
Complete the following set-up in Greentree before configuring the App.

WORK CENTRE MAINTENANCE

1. Select the menu item | System | Manufacturing | Work Centre Maintenance |

Type in the code and description for the work centre - they are then added to the Route plan when the assembly is saved and can be edited afterward.

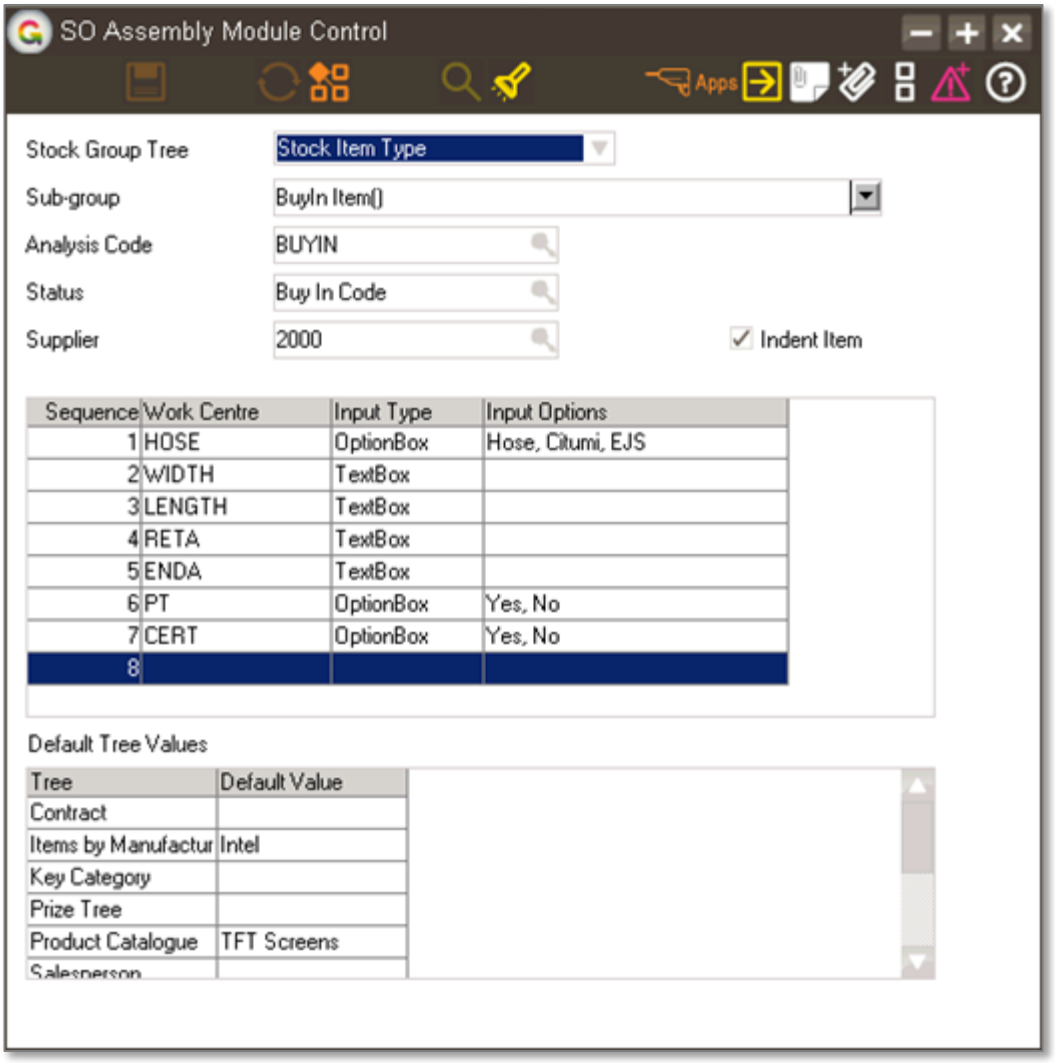




The values entered against them during SO Assembly entry are then saved into the notes tab of the Factory and can be edited and printed.

APP CONFIGURATION

1. Select/Highlight the Custom Assembly Sales Manufacturing App.
2. Click on the Change button



These settings determine:

a. The Group Tree & Sub Group, Analysis Code, Status and Supplier, which will be assigned to all SO Assembly products created.
b. Whether Assembly items may be Indented.
c. The work centres to be used on the Bill of Materials.
d. The Default values for any Inventory Trees assigned to new Items.

All other required fields will be populated based on your IN Module Control settings.

Sequence	This determines the order the items appear in SO Assembly entry
Work Centre	Select the workcentre from the drop down list – refer below

Input Type	Select from Text Box or Option Box. A Text box allows the user to type any alpha numeric values, a select box then requiresyou to type the available options and the user will select one during SO Assembly entry
Input Options	Type the options the user gets to choose from.