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.

# **USER INSTRUCTIONS**

#### 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

					L	ast Order Numb	er	500284	
S	ales Order		Line Item		Delivery Del	tails	Custo	m	
Dider Detail Number	500284		Customer Detail Code	1005		Alpha	WAGINS		
Branch	01 (Auckland)	- W	Name	Wagin Secondary					
Order Date	15/07/2013		Currency	New Zealand Dolla	rs Rate		1.0000000 0	Fixed	
Delivery Date	15/07/2013		Discount	0.00 %		Salesperson	Sally Scoresby (SSc		
Location	01	Ψ.	Payment Terms	30 Days from Invoi	ce Date	S. Fre	sight Type StdFrei	ght 🔻	
			Order Number				Customer Str	stute	
	Forward Order		Narration						
Status	Entered								
Entered by	SUPER		Drint Onlines						
	Drop Ship		Packing Slp	Order Status	Invoice	On Hold	Cancel Order	Save Header	
					Create Assem	bly		Create Buy-In	
Discount	0.00 Surcharge		0.00 Net	0.00 Tax	0.00	Total	0.00		
No. Type Ac	count/Code D	escription	Local	tion Quantity	Price	Disc%	Total Narration		Deliv
1 17 -				0.0000	0.0000	0.00	0.00	1	5/

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

G SO Assembly	<b>₩</b>	Q 🖋	••••	⊌	-9+	- + ×
Description	Description of the fir	nished produ	ct including length	or other info		
Quantity		5				
Required By	20 / 07 / 2013 📰					
Hose Type	Hose	🔿 Cîtumi	$\bigcirc$ EJ	s		
Width	25mm					
Length	1500mm					
Retention A	Clamp					
EndA	Screw top					
Pressure Test	Yes	🔿 No				
Certificate Required	⊖ Yes	No				
Code Dese WKEY001 Logi 01MSI845MAX2 MSI 100119 Red	cription tech Wireless Keyboa Dual Core Desktop Hose with Crimp Ends	rd s	Qty 1.0000 1.0000 1500.0000	Unit Cost 80.00 353.77 728.25	Total Cost 80.00 353.77 1092375.00	
Special Instructions	Additional informatio	n to print on	the factory order			*
Adding a new SO A	ssembly		There are 1	64 SO Assembly		

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.

G SO Orde	r Entry							- + x
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					L	ast Order Numb	er	500284
S	ales Order		Line Item		Delivery Del	tails	Custor	n
Order Detail Number	500284	۹,	Customer Detail Code	1005		Alpha	WAGINS	
Branch	01 (Auckland)	V	Name	Wagin Secondary				
Order Date	15/07/2013 📰		Currency	New Zealand Dollars	Rate		1.00000000 🔲 F	ïxed
Delivery Date	15/07/2013 🔤		Discount	0.00 %		Salesperson	Sally Scoresby (SSc)	<b>A</b> .
Location	01	T.	Payment Terms	30 Days from Invoice	Date	S. Fr	eight Type StdFreig	ht 🔻
			Order Number				Custo <u>m</u> er Sta	tus
Status	Forward Order Entered		Narration					
Entered by	SUPER							
	Drop Ship		Print Options Packing Slip	Order Status	Invoice	On <u>H</u> old	Cancel Order	Save Header
				C	reate <u>A</u> ssem	ьly		Create <u>B</u> uy-In
Discount	0.00 Surcharge		0.00 Net	4.35 Tax	0.65	Total	5.00	
No. Type Ac	count/Code D	escription	Locat	ion Quantity	Price	Disc%	Total Narration	DelivDate
1 IN 10	0160 D.	escription	Order Line Statu	JS 5 0000	1.0000	0.00	5.00	15/07/2013
			<u>C</u> ancel Line					
			Kitset					
-			FO/PO Link					
Editing an ex	kisting Sales Order		Sales <u>H</u> istory	Sale	es Order 267	of 287		

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

G Bill of Materials Mai	ntenance	<b>S (1)</b>	•••	Ð			- Sat	ops 🔁 🔍 🗸	- + × ⑦ <u>♪</u> ∃		
Item code 100160  Secription Description of the finished product including length or other info											
Batch size 1.0000 Create MRP order per batch size Is a phantom BOM structure Create MRP order per batch size Is a phantom											
🗹 Allow additional materials	Bill costing method	Average Cost									
Summary Information											
Total estimated batch cost	1092808.77	Total leadtim	ie 7.0	0	Hours						
Stocking unit	EA										
Modified by	SUPER	Last change	e date 15	/ 07 / 20	13 📰						
Notes: Print on factory ( Additional information to print Details: Print line narratic	order on the factory order n on factory order	Route	<u>P</u> lan	<u>R</u> e-ca	Iculate cost						
Sequence Code	Description	Quantity A	llow Qty Cho	g Unit	Unit Cost	Total Cost	Fixed Cost	Narration			
1 WKEY001	Logitech Wireless Ke	1.0000	2	EA	80.00	80.00					
2 01MSI845MAX2	MSI Dual Core Desk	1.0000	V	EA	353.77	353.77					
3 100119	Red Hose with Crimp	1500.0000 1.0000		EA	728.25	1092375.00					
							_				

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

G IN Inventory Item Maintenance	- + × ⊲Apps 🖓 🛡 🕅 💬
Code 100160   Description Description of the finished p	roduct including length or other in 15 Save details
Main         Defaults         Transactions         Custom         Notes         Sales I           Analysis code         BUYIN         BUY IN CODE 98         On-hand que On-hand         On-hand que	History Related Analysis Costing antities 0 Pricing
Job activity code STOCK (Stock) V Committee Type Not Serial/Lot Item V Committee Protected	d Qty 0 sked Qty 0 sked Qty 0 to factory orders 0 to requisitions 0 to regulate the second of the se
Kitsets exist       Non diminishing       Available         Unit weight       0.0000       Indent Item       On-order         Unit volume       0.0000       Keep warranty details       On-order         Stocking unit       EA       Allow negative available       On-shipmen         Stocktake details       Cycle       Monthly       Stock ranking       None         Location       Next Stocktake Date       Stocktake in Progress       Last         01       Date       Date	Image: Constraint of the constr
Status Buy In Code Supercession details This item to this item has been superceded Details Process This item to the statement of the statement	replaced an old item D <u>s</u> tails

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

G Factory	/ Order Entry								- + ×
		<b>ेक्ष</b> ्र	<b>S (B</b> )	<b>()</b>	⊌		-9	Apps 🔁 🖳	🖉 🖁 <u>۸</u> 🕄
Order numbe	r 500284	Crder dal	te 🄢/(	07 / 2013 📱	Release da	ite 15/07/20	)13 🚃	Required date	15/07/2013 📰
Parent code	100160	Cescripti	on Desc	ription of the	finished produc	ct including leng	th or oth	ner info 🔍 🔍	
Location	01	🔻 Qty requi	red	!	5.0000 EA	Leadtime hour	s	1.00	<u>R</u> oute plan
Estimated tota	al cost 54	64043.8500 Status	Enter	ed & Not Co	mmitted				Adjustment
Inventory Iss	Inventory Issue Options                • Auto issue on commit             • Backflush materials <u>Show materials</u>								
Location Vie Select lo	w Options ocation	V	) Selec	ct warehous			V	) All	Print picking list
		Select Materials					N	otes	
Sequence	Code	Description	UOM	Location	Qty Available	Qty Required	Select	Narration	
1	WKEY001	Logitech Wireless Key	EA	01	-1.0000	5.0000	~		
2	01MSI845MAX2	MSI Dual Core Deskto	EA	01	0.0000	5.0000	~		
3	100119	Red Hose with Crimp B	EA	01	0.0000	7500.0000			

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

G App	s For Greentr	ee Module C	Control							
		Ø 🔠	ão 🝼			Apps	🗆 🤇	9 🖌 🔏 💡		
Enter Ne	Enter New Registration CodeInstall AppDelete Inactive/Expired AppsInstall App									
Code	Name				Descr	iption	Active	Expiry Date 🔺		
000000	Apps For Greentre	ee Form			App U	sage information on Forms	~	31 December 2		
010001	AR Sales Orders 1	Tab			Tab in	Tab in Customer maintenance to display Sales Ord 🔽 👘 03 December 🤅				
010002	IN Reorder Workl	bench			Invent	ory Reorder Workbench	~	31 December 2		
010003	IN Min/Max Work	bench			Invent	ory Min/Max Workbench		31 December 2		
010004	AR Sales History	Tab			Tab in	Customer maintenance to display Sales H	isl 🔽	31 December 2		
010005	AB Pricing Tab				T ah in	Customer maintenance to display Pricing		31 December 2		

- 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 |

JC Work Centre Mainter	nance C	_ ∠ ╂ �� 🥶 🛃 🖘 🗩 🕑 👁 🍫	+ 1 1
Code CERT 🔍	Description	Certificate Required	
Bill of materials Notes		Print on factory order	
Work in progress GL account		· •	
Ready		Work Centre 3 of 19	

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.

G Bill of Ma	terials Route Maintenance					- + ×
		२ 🚀				☞ 🕂 ⑦
Code 100160	Description	Description	n of the fin	ished product inclu	uding length o	r other info
Details:				Total leadtime	7.00	Hours
Work Centre	Description	Leadtime	Is fixed			
WIDTH	Width	1.00				
LENGTH	Length	1.00				
RETA	Retention A	1.00				
ENDA	End A	1.00				
PT	Pressure Test	1.00				
CERT	Certificate Required	1.00				
L						

G Factory O	rder Entry						- + ×
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Order number 50	00284	Order date	15/07/2013 📰	Release da	te 15/07/2013	3 📰 Required date	15/07/2013 📰
Parent code 10	00160 🔍	Description	Description of the fir	nished produc	t including length	or other info 👘 🔍	
Location 01	1	Qty required	5.0	000 EA	1.00	<u>R</u> oute plan	
Estimated total co	ost 5464043.8500	Status	Entered & Not Com	oitted			<u>A</u> djustment
Inventory Issue (	Options						
Auto issue	on commit 🛛 🔿 Backl	flush materials				${\sf Location}\underline{T}{\sf ransfer}$	<u>S</u> how materials
							<u>Commit materials</u>
Location View O	Iptions						Print picking list
Select locati	ion	• 0	Select warehouse				Material serial/lot
	Select Ma	terials				Notes	
Factory order n	otes					Print on fa	actory order
Additional inform	mation to print on the facto	ry order					A
Work centre no	otes					Print on fa	actory order
Work Centre	Description	Not	es				
CERT	Certificate Required	No	1				
ENDA	EndA	Scr	ew top				
HOSE	Hose Type	Hos	e:				
LENGTH	Length	150	10mm				
PT	Pressure Test	Yes	:				
RETA	Retention A	Clar	mp				
WIDTH	Width	25n	nm				
Ready				factory order	23 of 38		

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

Ġ SO Assembly Mo	odule Co	ntrol			= + ×
	ିକ୍ଷ	3	Q 🚀	- 🕞 Apps 🧕	2 🗗 😵 🖓 🕘
Stock Group Tree	Stock	Item Type	V		
Sub-group	BuyIn I	tem()			
Analysis Code	BUYIN		•		
Status	Buuln	Code			
0.040	coop in	0000			
Supplier	2000			$\checkmark$	ndent Item
Commence by Judy Comb	- 1		luna d Ontinua		
1 HOSE	e i	Input Type IndianBay	Hose Citurai	FIS	
20/078		TeviBoy	Hose, citani,	205	
2 WIDTH		TeviBox			
APETA		TeviBox			
5 ENDA		TevtBox			
6 PT		DotionBox	Yes No		-
ZCEBT		OptionBox	Yes, No		-
8	Ì	opaonoon	100,110		
					-
Default Tree Values					
Tree Dal	fault Value				
Contract		,			
Items by Manufactur Inte	4				
Key Category					
Prize Tree					
Product Catalogue TF1	TFT Screens				
Salesperson					

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.