

WORK ORDER PROCUREMENT

For Microsoft Dynamics SL

PROJECTS

eBanking

Manufacturing

Time-sensitive demand for Inventory is nicely tracked in the Microsoft Dynamics SL *Work Order (WO)* and in the Sandler-Kahne *Project.Work.Order (PWO)* module. When it comes to providing supply to meet that demand, it is very important to know the overall scope of that demand, and to be able to purchase inventory directly to the WO or PWO, as well as to stock. *Work Order Procurement (WOPR)* will help you with that process.

Benefits

Demand for materials is identified on Work Orders and Project Work Orders. *WOPR* provides the ability to create purchase orders to provide the supply to meet that demand. The ability to see this demand on specific or multiple Work Orders or Project/Tasks, and to then act on that demand to order those materials is critical to smooth operations.

PO Advices

WOPR works by separating the task of creating advices to purchase from the process of creating purchase orders. In this manner, separation of duties may be maintained, if desired. These advices may be created one-at-a-time directly from the Material List in the *WO* or *PWO* modules, or en-masse thru *WOPR*'s Material List Workbench.

PO Advice Management

Once advices to purchase exist in the system, the *Advice Management* screen (pictured at right) provides a robust means to group and view those advices. All the information you need to make a purchasing decision is at your fingertips.

Unlimited user-defined views give you the ability to group, review, and update the advices you have selected. These views may be saved and made available for all to use, or only those you wish to give access.

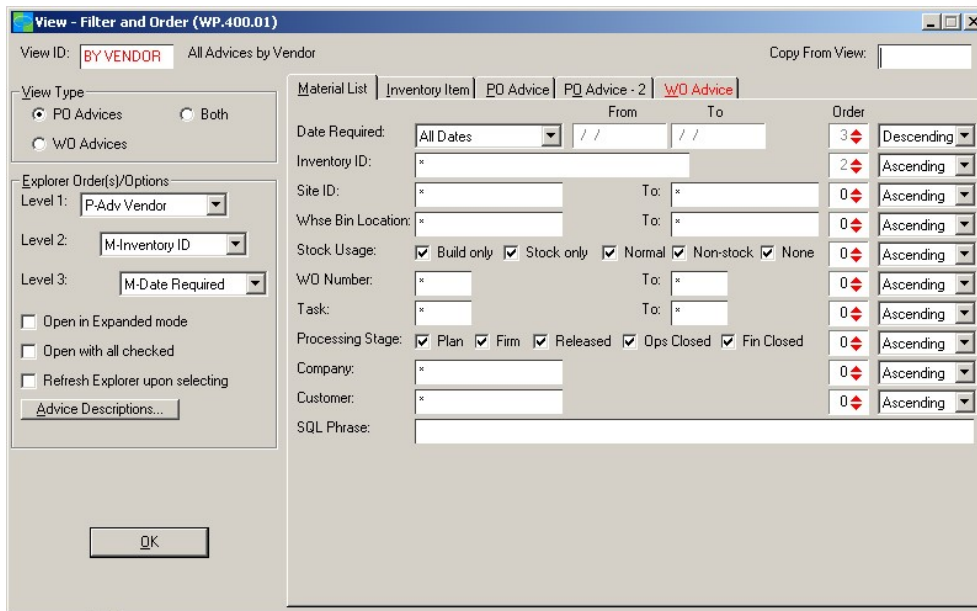
Some examples of how you might use these views include:

- Show all items required for a Project or Project/Task.
- Show all demand for a given item or items across all requirements.
- Show all items required for all jobs for a specified customer.
- Show all items required in the next 45 days (e.g.) grouped by *Primary Vendor*.

...or nearly any other configuration you can come up with!

Designed For
**Work Order
(MS Dynamics SL™)**
and
**Project Work Order
(Sandler*Kahne)**

- Purchase Order Advice Management
- Purchase Order Generation



Creating views is a simple point-and-click activity. Save as many views as you like. Make them public or private!

Generate PO's

Now that the advices to purchase have been identified and reviewed, simply select the ones for which you wish to generate purchase orders, click a few buttons, and the PO's will be created with links back to their respective demand lines. Do you want to print the PO's at the same time? No problem! Simply select the *Print PO* box and they'll get printed at the same time they're created!

Non-Inventory Items

Not only does *WOPR* give you the ability to buy pre-defined inventory items directly to a *Project Work Order* or *Work Order* material line, but it also enables *Project Work Order* to allow you to enter a non-inventory item on its Material List, and buy that item directly...as though it were defined in inventory! *Project Work Order* still tracks the item's quantity requirements and movements.

So...if you need to plan for, estimate, order and track materials you use on a job...but don't need to inventory the items...*WOPR* and *PWO* are just the team you're looking for!

Material List Workbench

Perhaps your material planning activities demand that you review the entire list of material requirements on a Project/Task before ordering. You'd prefer not to identify the individual items to purchase on a one-by-one basis. *WOPR's Material List Workbench* was created for just that purpose.

In addition to giving you the means to process the list as a whole, or groups of items, the *Material List Workbench* helps you consolidate multiple occurrences of the same item...in case you created your material list via import or copy/paste.

WOPR highlights:

- Issue PO's for materials for:
 - Project Work Orders
 - Dynamics SL Work Orders
- Allows non-inventory items
- Separate Advice system permits approval-like functionality
- User-defined views of purchasing requirements
- Expediting functionality

Warning Logs

In a perfect world, once plans are set in motion, they wouldn't change. But we all know they do...and it's important to know how that affects us. *WOPR's Warning Logs* will keep you informed if delivery dates slip or expected quantities change that will result in a planned shortage condition. This very important *expediting* information will help make your task of recovery much easier.

Purchasing Inquiry

There are times when you will want to check the status of purchase orders that you previously generated for one or more Projects. *Purchasing Inquiry* gives you many options and filters to use in getting this information. These inquiries can be applied to *Project Work Orders* or *MS Dynamics SL Work Orders*. Some examples include:

- o Show all *open* PO's for a specific Task on a *PWO*.
- o Show all *closed* PO's for a *Work Order*.
- o Show all *open* PO's for a *PWO* that have a date or quantity problem.
- o Show any PO's that have been partially received against a *PWO*.

BUSINESS ISSUES	HOW THIS FLEXIBLE PRODUCT CAN HELP
I have items that I need to order for a Task on a Project, but the items aren't defined in Inventory.	Use Work Order Procurement with Project Work Order When <i>WOPR</i> is used with <i>PWO</i> , you are able to identify a non-inventory item on your material requirements list, order that item, and receive it against the Task that needs it...just as though it <i>were</i> defined in Inventory.
I need to buy the same item for several Projects. Can I do that on one PO?	Absolutely! Use Advice Management Advice Management gives you the ability to view all the demand for a given item, then issue a PO to buy all or some of them. When the item is received, all the affected Projects will be updated.
My vendor just called to say they're running late. Where will this affect me?	Automatic Warning Logs Whenever an event occurs that will cause a shortage condition, an entry will be automatically created in the Warning Log. Periodic review of this log will put these conditions right in front of you.
Engineering just increased the quantity required for an item that I've already issued a PO for. How will I know that?	Warning Logs and Purchasing Inquiry An entry will be automatically created in the <i>Warning Log</i> . <i>Warning Log Inquiry</i> and <i>Purchasing Inquiry</i> will both give you visibility into this condition.
It is important that I be able to readily identify the serial number of a component that was used on a particular task.	<i>PWO</i> tracks lot/serial numbers Whether a serialized item was simply used on a task, or was transferred, then transferred again, <i>PWO</i> will keep track of that information for you.

Prerequisites:

- SL Purchase Order
and
- SL Work Order or
SK Project Work Order

Available on these versions of MS Dynamics SL:

2018, 2015, 2011, 7.x, 6.x



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